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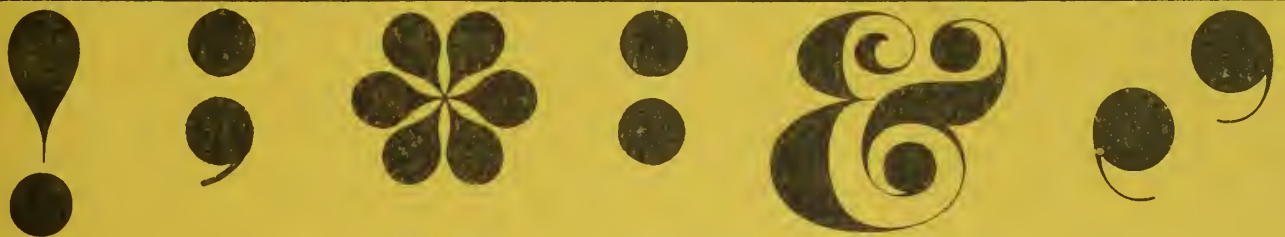
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## Business Education Curriculum Guidelines



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Business education curriculum guidelines



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## **BUSINESS EDUCATION CURRICULUM GUIDELINES**

**Dolores Colburg  
Superintendent of Public Instruction  
Helena, Montana**

**DECEMBER, 1971**



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## INTRODUCTION

Business education courses are an integral part of the comprehensive high school instructional program. With increasing emphasis being placed on effective business education, curriculum planning and subject area guidelines are vitally important. This publication has been designed to serve as a guide for the teachers, counselors and administrators involved with business education in Montana, and it also may supplement each school's evaluation and planning efforts for improved business education.

The contents of this guide resulted from a Business Education Curriculum Institute conducted during the summers of 1970 and 1971, sponsored by my office and directed by Daniel G. Hertz of the School of Commerce at Montana State University in Bozeman. Appreciation is expressed to the Institute staff and all participants for their cooperation and enthusiasm. Miss Janet Hughes, Business Education Supervisor in my office, has devoted diligent effort and talent in the compilation of these guidelines; her contributions and service also merit commendation.

Continued cooperation and consultation, of course, are indispensable in an endeavor of this nature. Please consider these guidelines as *suggested* guidelines, not as a syllabus or course of study to follow. Suggestions for future updating and refinement of this guide are welcomed.

Dolores Colburg

SUPERINTENDENT OF PUBLIC INSTRUCTION





**Recommended Business Curriculum for Schools  
with an Enrollment of 500 and Over**

**STENOGRAPHIC AND SECRETARIAL**

<b>Grade</b>		
<b>9</b>	R	Typing I
	R	Basic Business
<b>10</b>	R	Typing I
	R	Basic Business
		Business Math
<b>11</b>	R	Typing, Third Semester
	R	Shorthand
	R	Bookkeeping
	R	Data Processing
		Consumer Economics
		Business Machines
		Business Math
		Economics
<b>12</b>	R	Secretarial Office Procedures
	R	Business Communications
	R	Shorthand II
	R	Bookkeeping
	R	Data Processing
		Consumer Economics
		Business Law
		Business Machines
		Economics
		Cooperative Office Education
		Simulation

**CLERK TYPIST**

<b>Grade</b>		
<b>9</b>	R	Typing I
	R	Basic Business
<b>10</b>	R	Typing I
	R	Basic Business
		Business Math
<b>11</b>	R	Typing, Third Semester
	R	Bookkeeping
	R	Data Processing
	R	Business Machines
		Shorthand I
		Consumer Economics
		Business Law
		Business Math
		Economics

Grade  
12

R Clerical Office Procedures  
R Business Communications  
R Bookkeeping  
R Business Machines  
R Data Processing  
Shorthand II  
Consumer Economics  
Business Law  
Economics  
Cooperative Office Education

### COLLEGE PREP WITH A BUSINESS BACKGROUND

Grade  
9

R Typing I  
R Basic Business

10

R Typing I  
R Basic Business

11

R Typing, Third Semester  
R Shorthand I  
R Data Processing  
Bookkeeping  
Economics  
Business Law  
Business Machines

12

R Shorthand I or II  
R Data Processing  
R Typing, third Semester  
R Economics  
Clerical or Secretarial Office Procedures  
Business Communications  
Bookkeeping  
Business Law  
Business Machines

### DATA PROCESSING AND BOOKKEEPING

Grade  
9

R Typing I  
R Basic Business

10

R Typing I  
R Basic Business  
Business Math

11

R Typing, Third Semester  
R Bookkeeping  
R Business Machines  
R Data Processing  
Shorthand I  
Consumer Economics  
Business Law

**Recommended Business Curriculum for Schools  
with an Enrollment of 500 and Over (cont)**

**DATA PROCESSING AND BOOKKEEPING**

<b>Grade 11</b>		Business Math Economics
<b>12</b>	R	Bookkeeping
	R	Business Machines
	R	Data Processing
		Clerical or Secretarial Office Procedures
		Business Communications
		Shorthand II
		Consumer Economics
		Business Law
		Economics
		Cooperative Office Education

**Recommended Business Curriculum for Schools  
with an Enrollment between 200-500**

**STENOGRAPHIC AND SECRETARIAL**

<b>Grade 9</b>	R	Typing I
	R	Basic Business
<b>10</b>	R	Typing I
	R	Basic Business
		Business Math
<b>11</b>	R	Typing--Third Semester
	R	Shorthand I
	R	Bookkeeping
	R	Data Processing
		Business Communications
		Business Law
		Business Machines
		Business Math
		Consumer Economics
		Economics
<b>12</b>	R	Secretarial Office Procedures
	R	Shorthand II
	R	Bookkeeping
	R	Data Processing
		Business Communications
		Business Law
		Business Machines
		Consumer Economics
		Economics
		Cooperative Office Education
		Simulation

Recommended Business Curriculum for Schools  
with an Enrollment between 200-500 (cont)

**CLERK-TYPIST**

Grade 9	R	Typing I
	R	Basic Business
10	R	Typing I
	R	Basic Business
		Business Math
11	R	Typing, Third Semester
	R	Bookkeeping
	R	Data Processing
	R	Business Machines
		Business Communications
		Business Law
		Business Math
		Consumer Economics
	Economics	
	Shorthand I	
12	R	Clerical Office Procedures
	R	Bookkeeping
	R	Data Processing
	R	Business Machines
		Business Communications
		Business Law
		Economics
		Cooperative Office Education
	Simulation	

**COLLEGE PREP WITH A BUSINESS BACKGROUND**

Grade 9	R	Typing I
	R	Basic Business
10	R	Typing I
	R	Basic Business
11	R	Shorthand I
	R	Bookkeeping
	R	Economics
		Typing, Third Semester
		Business Communications
		Business Law
	Business Machines	
12	R	Secretarial Office Procedures
	R	Shorthand I
	R	Economics
	R	Bookkeeping
		Business Communications
		Business Law
	Business Machines	

**Recommended Business Curriculum for Schools  
with an Enrollment Between 75-200**

**STENOGRAPHIC AND SECRETARIAL**

<b>Grade</b> <b>9</b>	R	Typing I
	R	Basic Business
<b>10</b>	R	Typing I
	R	Basic Business
		Business Math*
<b>11</b>	R	Typing, Third Semester*
	R	Shorthand I**
	R	Data Processing*
	R	Bookkeeping
		Business Communications*
		Business Law**
		Business Machines* Business Math*
<b>12</b>	R	Secretarial Office Procedures
	R	Shorthand II* **
	R	Data Processing*
	R	Bookkeeping
		Business Communications*
		Business Law**
		Business Machines*
		Economics** Cooperative Office Education Simulation

**CLERK-TYPIST**

<b>Grade</b> <b>9</b>	R	Typing I
	R	Basic Business
<b>10</b>	R	Typing I
	R	Basic Business
		Business Math*
<b>11</b>	R	Typing, Third Semester*
	R	Bookkeeping
	R	Business Machines*
	R	Business Communications*
	R	Data Processing*
		Shorthand I
		Business Law** Business Math* Economics* **
<b>12</b>	R	Clerical Office Procedures
	R	Bookkeeping
	R	Business Machines*
	R	Business Communications

**Recommended Business Curriculum for Schools  
with an Enrollment Between 75-200 (cont)**

**CLERK-TYPIST**

Grade 12	R	Data Processing* Shorthand Business Law** Economics** Cooperative Office Education Simulation
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**COLLEGE PREP WITH A BUSINESS BACKGROUND**

Grade 9	R R	Typing I Basic Business
10	R R	Typing I Basic Business
11	R R R	Shorthand I Bookkeeping Data Processing* Typing, Third Semester* Business Communications* Business Law** Business Machines*
12	R R R	Bookkeeping Data Processing* Shorthand I Secretarial Office Practice Business Communications* Business Law** Business Machines* Economics**

**Recommended Business Curriculum for Schools  
with an Enrollment of Under 75**

**STENOGRAPHIC AND SECRETARIAL**

Grade 9	R R	Typing I Basic Business
10	R R	Typing I Basic Business
11	R R R	Typing, Third Semester* Shorthand I** Bookkeeping** Business Communications** Business Machines*

**Recommended Business Curriculum for Schools  
with an Enrollment of Under 75 (cont)**

**STENOGRAPHIC AND SECRETARIAL**

<b>Grade</b> <b>12</b>	R R R	Secretarial Office Procedures Bookkeeping Shorthand I*** Business Communications*** Business Law** Business Machines* Simulation
---------------------------	-------------	--

**CLERK-TYPIST**

<b>Grade</b> <b>9</b>	R R	Typing I Basic Business
<b>10</b>	R R	Typing I Basic Business Business Math*
<b>11</b>	R R R	Typing, Third Semester* Business Machines* Bookkeeping Business Communications* ** Business Law** Business Math* Shorthand I**
<b>12</b>	R R R	Clerical Office Procedures Business Machines* Bookkeeping Business Communications* ** Business Law** Shorthand I** Simulation

**COLLEGE PREP WITH A BUSINESS BACKGROUND**

<b>Grade</b> <b>9</b>	R R	Typing I Basic Business
<b>10</b>	R R	Typing I Basic Business
<b>11</b>	R R	Bookkeeping Shorthand I** Typing, Third Semester* Business Law** Business Machines* Business Communication* **
<b>12</b>	R R	Bookkeeping Shorthand I**

Recommended Business Curriculum for Schools  
with an Enrollment of Under 75 (cont)

**COLLEGE PREP WITH A BUSINESS BACKGROUND**

Grade  
12

Secretarial or Clerical Office Procedures  
Business Communications\* \*\*  
Business Law\*\*  
Business Machines\*

**Key:**

- \* Indicates that in a small business education department it may be necessary to incorporate this course as a module or unit within another course such as Secretarial Office Procedures.
- \*\* Indicates that these courses could be offered alternate years in a small business education department.
- R These courses are recommended for obtaining minimum entry level proficiencies for this sequence.

**Note:** Some courses are listed under more than one guide. This will permit greater flexibility in scheduling.



# BASIC BUSINESS

Full year course

Grades 9 or 10

Basic

Basic business will broaden the economic understanding for everyday living for all students by giving them an overall view of the place and purpose of business in our society. Such units as banking, insurance, credit, personal finance, business communications and taxes are studied. Fundamental processes of arithmetic in business situations and a vocabulary of business terms are integral parts of the course.

## TABLE OF CONTENTS FOR BASIC BUSINESS

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IX. LAYOUT AND FACILITIES . . . . .	22

## I. OBJECTIVES: \*

The student will:

- A. develop economic literacy by acquiring better understanding of the American economic system of free enterprise
- B. research and prepare a paper investigating a career of his choice and will give an oral synopsis of his findings to the class
- C. demonstrate competencies in
  - 1. banking
  - 2. personal finance and investment
  - 3. personal records
  - 4. consumer buying
  - 5. insurance
  - 6. business communications
- D. participate in all activities related to applying for employment.

## II. UNITS--TOPICAL OUTLINE:

- A. What is Business
  - 1. Basic Economic Principles
    - a. Free enterprise system
    - b. The function of the individual
    - c. Factors of production
  - 2. Structure of Business
    - a. Sole proprietorship
    - b. Partnership
    - c. Corporation
    - d. Cooperative
  - 3. Flow of money from government and business to the consumer and back
- B. Money and Banking
  - 1. What is money and its value
  - 2. Basic structure of our monetary system
  - 3. Banks
    - a. Function of banks
    - b. Type of banks
    - c. Service of banks
    - d. Automation of banks

\*The minimum acceptable standards should be determined by the individual teacher. Suggested standards are given in Chapter IV of this section.

- C. Personal Finance
  - 1. Budgeting
    - a. Planning a personal and family spending budget
    - b. Keeping records of receipts and expenditures
  - 2. Buying on credit
    - a. Open accounts
    - b. Installment buying
    - c. Long-term obligations
    - d. Credit reputation
  - 3. Borrowing money
    - a. Short-term credit
      - 1. Promissory notes
      - 2. Open accounts
      - 3. Computation of interest
      - 4. Where to borrow
    - b. Long-term credit
      - 1. Mortgages
      - 2. Collateral
      - 3. Interest
  - 4. Elements of a contract
  - 5. Dangers of indiscriminate credit buying and borrowing
- D. The role and function of advertising in the free-enterprise system
- E. Insurance
  - 1. Purposes of insurance
  - 2. Kinds of insurance
    - a. Personal
      - 1. Life
      - 2. Sickness
      - 3. Accident
    - b. Property
    - c. Liability
    - d. Social Security
    - e. Special protection
  - 3. Policy as a contract
  - 4. Insurance as savings
  - 5. Premiums
  - 6. Settlement options
  - 7. Legal principles involved
  - 8. Planning the insurance program

## Basic Business

### F. Savings

1. Bank
2. Savings and Loan Associations
3. Insurance
4. Investments
  - a. Homes
  - b. Stocks
  - c. Bonds

### G. Communications

1. Types
  - a. Postal services
  - b. Telephone
  - c. Telegraph and cablegram
  - d. Letter
    1. Composition
    2. Form
    3. Basic rules of letter writing
2. Uses
  - a. Personal
  - b. Business

### H. Travel

1. Methods
  - a. Private carrier
  - b. Common carrier
2. Reading road maps and timetables
3. Itinerary planning

### I. Shipment of Goods

1. Postal
2. Express
3. Freight

### J. Basic Office Procedure

1. Filing
2. Communications
3. Records control

- K. Taxes
  - 1. Types
  - 2. Purposes
  - 3. Preparation of individual income tax returns
- L. Selection of an Occupation
  - 1. Business-oriented occupations
  - 2. Professions
  - 3. Other vocational areas
  - 4. Personal qualities for success in each area
  - 5. Opportunities in each area
    - a. Personal
    - b. Financial
  - 6. Advantage and disadvantages of vocational choices
- M. Applying for a position
  - 1. Contracts
  - 2. Conduct
  - 3. Appearance

### III. TEACHING METHODS

The content and nature of Basic Business is such that the variety and scope of teaching methods is practically unlimited. The textbook should probably be used as a point of departure to help insure that no area is completely neglected. It should not be followed religiously, nor is it necessary to complete all the units in sequence. Materials the students collect for such items as projects, reports and bulletin boards could be the backbone of the course.

- A. Conduct a preview of the unit or part to be studied (pre-test). This avoids spending too much time on material already familiar to the class.
- B. Explain the principles or practices involved in the unit. Use examples from the community as much as possible.
- C. Provide for a directed study period. Divide the class into intervals for study, laboratory work, field trips and discussion. Individual differences may be handled by differentiated assignments.
- D. Use the community as a laboratory. Have carefully planned field trips--either the entire class or small groups who report back.
- E. Have representatives of business speak to the class.

## Basic Business

- F. Use multi-sensory aids. Timely films and filmstrips add student interest to the units.
- G. Provide for various kinds of discussion periods. Classroom situation with the teacher directing the discussion is recommended. Committee or round-table type of discussion with chairmen in charge is also suggested. A summary discussion period should be aimed at integrating and organizing the separate knowledges, attitudes, skills and appreciations gained.
- H. Provide for occasional question and answer periods to provide an opportunity for review and reinforcement.

Aids in the teaching process:

1. use skits and role playing
2. have individual reports, panel discussions and debates
3. have each student plan a trip including methods of travel, itinerary, room reservations, expenses
4. use the teletrainer in the communications unit
5. read and clip pertinent items from local newspapers
6. utilize magazines and periodicals
7. prepare personal, family and club budgets
8. have a research project which will require the use of the library facilities
9. individuals and committees might have projects such as collecting information on various business topics, preparing bulletin boards, construction of posters and charts and conducting surveys on such topics as teenage buying
10. use the tape recorder and video tape for feedback purposes
11. compare media advertising
12. use local resources to help demonstrate proper job interview techniques
13. follow a court case
14. compare store prices per unit for various items
15. for exploratory purposes, visit other business classes
16. establish an investment portfolio.

## IV. EVALUATION, STANDARDS OF PERFORMANCE, TESTING AND GRADING

A course such as basic business is divided into units; therefore, the logical time for testing is at the completion of a unit. Short chapter quizzes are recommended.

Types of tests that may be used advantageously are

1. pre-tests
2. standardized tests
3. short answer tests
4. essay tests
5. problem tests
6. oral exams.

The grading scale will be determined by each individual school or teacher.

Suggested teacher evaluation.

1. observation and analysis of student response and feedback
2. examination of accompanying workbooks, pupil-made notebooks, term papers and projects

3. analysis of individual and group discussion to find depth of understanding
4. analysis of tests given

## V. TEXTBOOKS AND TEXTBOOK REFERENCES

### Textbooks

DeBrum, S. Joseph and others, *General Business for Economic Understanding*, South-Western, 1971, Tenth Edition.

Polishook, William, *Today's General Business*, Ginn, 1969.

Price, Ray C., and others, *General Business for Everyday Living*, McGraw-Hill, 1966.

### Textbook References

Douglas, Lloyd and others, *Teaching Business Subjects*, Prentice-Hall, 1965.

Hindle, John and Feldman, Harold, *Mathematics in Business*, Allyn and Bacon, 1963.

Klise, Eugene S., *Money and Banking*, 4th Edition, South-Western, 1968.

Piper, Edwin and others, *Applied Business Mathematics*, South-Western, 1970.

Reigner, Charles G., *English for Business Use*, Third Edition, H.M. Rowe Company, 1964.

Smith, Charles B., *Modern Business Communications*, Pitman Publishing, 1963.

Tonne, Herbert and others, *Business Principles, Organization and Management*, McGraw-Hill, 1963.

### Other References

Dictionary of Occupational Titles, U.S. Printing Office

Occupational Outlook Handbook

## VI. BOOKLETS, PERIODICALS, JOURNALS, MAGAZINES AND MONOGRAPHS

### Booklets

*About This Stock and Bond Business*, Merrill, Lynch, Pierce, Fenner and Smith, Inc., 70 Pine Street, New York, New York, 10005.

*Blueprint for Tomorrow*, (A student workbook) Institute of Life Insurance, 488 Madison Avenue, New York, New York, 10022.

*Buying and Selling*, New York Stock Exchange, 11 Wall Street, New York, 10005. Others in this series include: *The American Corporation*; *Stocks: Common and Preferred*; *The New York Stock Exchange*; *Investing for American Families*; *Sources of Information on Investments*.

## Basic Business

*Casualty Insurance Handbook*, Insurance Information Institute, 60 John Street, New York, New York, 10038.

*General Information Manual: Introduction to Data Processing Systems*, (F22-6517) IBM, Data Processing Division, 112 East Post Road, White Plains, New York.

*Keeping Your Money Healthy*, Federal Reserve Bank of New York, 33 Liberty Street, New York, New York, 10005.

*Materials on Money and Banking for Elementary and Secondary Schools*, American Banking Assn., 12 East 36th Street, New York, N.Y. 10016.

*Money Management for Young Moderns*, Money Management Institute of Household Finance Corporation, Prudential Plaza, Chicago, Ill., 60601.

*Moneys of the World*, Chase National Bank, 1254 Avenue of the Americas, New York, New York, 10020.

*Personal Money Management*, American Bankers Association, 12 East 36th Street, New York, New York, 10016, or from your local bank.

*Source of Health Insurance Data*, Health Insurance Institute, 488 Madison Avenue, New York, New York, 10022.

*The Story of Taxes*, E. I. Dupont de Nemours and Company, Wilmington, Delaware, 19801.

*Understanding Modern Business Data Processing*, Beryl Robichaud, Gregg Publishing Company, 1966.

*What are Credit Unions and How Can We Use Them?* Credit Union National Association, 1617 Sherman Avenue, Madison, Wisconsin 53704.

*Using Bank Services*, American Bankers Association, 12 East 36th Street, New York, New York, 10016.

*What You Should Know Before You Buy a Home and Thrift and Home Ownership*, U.S. Treasury Department, Washington, D. C. 20226.

*How to Find and Apply for a Job*. South-Western, 11 Guittard Road, Burlington, California, 94101.

## Periodicals

General Circulation Periodicals. The teacher will find that these periodicals contain articles on business subjects that are both interesting and informative to students. Many are somewhat advanced, but are generally easily read and provide useful information. Transparencies can be made of charts and graphs.

*Business Week*, 330 West 42nd Street, New York, 10036.

*Changing Times*, 1729 H Street, N.W., Washington, D. C. 20007.

*Consumer Bulletin*, Washington, New Jersey, 07882.



*Consumer Finance News*, 1000 16th Street, N.W., Washington, D. C. 20036.

*Consumer Reports*, 256 Washington Street, Mount Vernon, New York, 10553.

*Fortune*, Time and Life Building, New York, New York, 10021.

*Nation's Business*, 1615 H Street N.W., Washington, D. C. 20006.

*U.S. News and World Report*, 2300 N Street, Washington, D. C. 20007.

#### Professional Periodicals

*Balance Sheet*, 5101 Madison Road, Cincinnati, Ohio, 45227.

*Business Education Forum*, 1201 16th Street N.W., Washington, D.C. 20006.

*Business Education World*, 330 West 42nd Street, New York, N.Y. 10036.

*Business Management*, 22 West Putnam Avenue, Greenwich, Conn., 06830.

*Business Periodical Index*, 950 University Avenue, New York, N.Y., 10452.

*Business Teacher*, 330 West 42nd Street, New York, N.Y., 10036.

*Journal of Business Education*, 15 South Franklin Street, Wilkes-Barre, Pa., 18701.

*National Business Education Quarterly*, 1201 16th Street, N.W., Washington, D.C. 20006.

#### Monographs

Available from South-Western Publishing Company:

No. 107 *Motivation in Teaching General Business*

No. G10A *Methods of Teaching General Business*

No. G12A *Methods of Teaching General Business*

### VII. FILMS, FILMSTRIPS, TAPES, RECORDS, TRANSPARENCIES, OPAQUE PROJECTIONS, CHARTS AND MODELS

"An American Legend," 22 min., free loan; 1962, Association Films, 347 Madison Avenue, New York, N.Y. 10017. Tells the story of the Fuller Brush Company and how it has prospered through service, courtesy and quality products.

"The Case for Competition," 30 min., black and white; \$135; 1962. Carousel Films, 1501 Broadway, New York, N.Y. 10036. Explains competition, profit, motives; discusses views of business regarding monopoly, labor, profits.

"The Challenge," 30 min; free loan; no date given. Sterling Movies U.S.A., 43 West 61st Street, New York, N.Y. 10023. Shows how corporations provide business opportunities for public service.

"Competition in Business," 14 min; black and white; \$105; 1962. Coronet Films, 65 East South Water Street, Chicago, Ill. 60601. Shows how competition in the business world works to improve the quality and value of the goods and services made available by business.

## Basic Business

- "Dear Boss," 13 min; free loan; no date given; Ideal Pictures; 1010 Church Street, Evanston, Ill. 60201. Shows businessmen the money-saving advantages of office modernization.
- "Education Plus--Cooperative Office Occupations," 20 min; free loan; no date given. Keystone Steel and Wire Company, Audio-Vusual Dept., Peoria, Ill. 61607. Shows how industry and business cooperate with schools.
- "General Business Series," black and white; \$35; no date given. Encyclopedia Britannica Films, 1150 Wilmette Avenue, Wilmette, Ill 60091. Explores leads open to high school students in search of a job.
- "Harvey's Dilemma," 20 min; free loan; 1963. U.S. Treasury Dept., Washington, D.C. 20226. Presents the story of a whimsical character, Harvey Dilemma, and what he did with his "extra" money.
- "The Marvelous Mousetrap," 23 min; color; \$275; 1963. Bureau of National Affairs, 1231 24th Street, Washington, D.C. 20037. Promotes understanding of American free-enterprise system.
- "Special Report to Stockholders," 7 min; free loan; no date given. General Mills, 9200 Wayzata Blvd., Minneapolis, Minn. 55440. Reviews company operations made possible by earnings reinvested in the business.
- "The World is Yours," 27 min; free loan; no date given; Association Films, 347 Madison Avenue, New York, N.Y. 10017. Tells the story of the founding and growth of a famous mercantile firm.
- "Yours to Keep," 27 min; free loan; 1963. U.S. Treasury Department, Washington, D. C. 20226. Portrays the thrift habits and financial problems of a typical American family; brings in principles of thrift described in Ben Franklin's "Poor Richard's Almanac."

## Banking

- "Bank Reconciliation," Business Education Films, 4607 16th Avenue, Brooklyn, N.Y. 11204.
- "Fred Meets a Bank," American Banking Association, 12 East 36 Street, New York, N.Y. 10016.
- "How to Use Your Bank," American Banking Association, 12 East 36 Street, New York, N.Y. 10016.
- "The Life of a Check," Massachusetts Bankers Association, 125 High Street, Boston, Mass., 02110.

## Business Law

- "What is a Contract?" Teaching Aids Exchange, Box 3527, Long Beach, Calif., 16 mm sound, rental fee \$2.50.

## Careers

- "A Career That Counts," Comtometer, 3900 Rockwell Street, Chicago, Ill., 60618, free.
- "Finding the Right Job," Business Education Films, NBEA.
- "Planning Your Career," Business Education Films, NBEA.

### Communication by Telephone

"A Manner of Speaking" and "The Voice of Your Business," Southwestern Bell Film Library, 915 West 23 Street, North Little Rock, Ark. or contact your local Mountain Bell representative.

### Insurance

"Anatomy of an Accident," Southwestern Bell Film Library, 915 West 23 Street, North Little Rock, Ark. 72114.

"Automobile Insurance," Director of Educational Relations, Insurance Information Institute, 110 Willia Street, New York, N.Y. 10038.

"Dollars for Health," "Dollars for Security," and "How Life Insurance Policies Work," Educational Division, Institute of Life Insurance, loan free.

"For Some Must Watch," and "Measure of a Man," Institute of Life Insurance sponsors, Association Films, Inc., 1621 Dragon Street, Dallas, Texas, free loan.

### Job Application and Interviews

"Finding the Right Job," Purchase from Coronet Instructional Films or rent through Business Education Films or your regular film library. Rental \$2.50, MP-SO-16mm, 11 min.

"First Job," "Getting a Job," and "Getting a Job and Keeping It," Text-film Division, McGraw-Hill Book Company, 330 West 42nd Street, New York, N.Y. 10036, \$8.00.

"Getting a Job," Britannica Press, MP-SO-16mm, 16 min.

"How to Apply For, Win and Advance on the Job," Visual Education, Inc., 1345 West Diversey Parkway, Chicago, Ill. 60614, \$3.00.

"How to Keep a Job," Coronet Instructional Films, for purchase or consult your regular film library for rental, MP-SO-16mm, 11 min.

### Labor Unions

Union films may be obtained from State AFL/CIO Office, 1408 Rebsamen Park Road, Little Rock, Ark. 72202.

### Letter Writing

"Effective Production of Business Letters," NP-SO-16 mm, Young American Films.

"Eight Parts of a Business Letter," SO-35 mm, Prudential Insurance Company of America, Newark, New Jersey.

"One Out of Every Six," SO-35 mm, 15 min., Prudential Insurance Company of America, Newark, New Jersey.

"Writing Better Business Letters," MP-SO-16 mm, 11 min., University of Illinois.

## Basic Business

### Personal Appearance and Office Etiquette

"Office Courtesy--Meeting the Public," free, Arkansas State Department of Education, Little Rock, Arkansas, 12 min.

"Office Etiquette," sold or rented by Britannica Press, 425 North Michigan Avenue, Chicago, Illinois 62521.

"Office Teamwork," free, Arkansas State Department of Education, Little Rock, Arkansas, 12 min.

### Personal Money Management

"Budget Ideas for Youth," 19 frames, Visual Education Consultants, 2066 Helena Street, Madison, Wisconsin, 53704.

"Managing Your Money," 45 frames, Text-Film Division, McGraw-Hill, Inc., 330 West 42nd Street, New York, N.Y. 10036. Series of Six: "Earning Your Money," "Spending Your Money," "Paying Your Bills," "Making Money Work For You," and "Borrowing Money."

## VIII. EQUIPMENT AND SUPPLIES

### A. Basic Equipment

1. Classroom should be furnished with sufficient furniture to allow each student writing space.
2. Overhead projector is a desirable item of equipment; a chalkboard is a necessity.
3. Office machines such as adding machines, calculators, photo-copier and duplicating machines should be in the general area for demonstration purposes or for project work.

### B. Supplies

1. A textbook for Basic Business should be selected from the textbook list to best fit the needs of the particular group of students.
2. A workbook published for the textbook can serve reinforcement learning.
3. A generous use of current periodicals and films, as well as weekly and daily newspapers, and materials from local businesses should be selected by the teacher.

## IX. LAYOUT AND FACILITIES

A standard classroom--no specialized facilities would be required.

# ECONOMICS

One semester or one year

Grade 11 or 12

Basic

A course in economics at the high school level has a simple purpose--increased economic understanding. The individual as a wage earner, consumer and investor should know that which is beneficial to him as an individual may not be good for the overall economy. Reasonable participation in the affairs of the community and nation require widespread economic understanding. Economics offered at the high school level not only provides informed consumers, but economically literate citizens who are capable of discharging their citizenship duties intelligently.

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## Economics

### I. OBJECTIVES\*

The student will:

- A. receive a general overview of how our economic system solves the big, basic economic problems
  - 1. what will be produced with our resources?
  - 2. how much can we produce and how fast shall the economy grow?
  - 3. who will get the goods and services produced?
- B. learn and use the specific vocabulary of economics
- C. describe how different economic systems solve the three basic economic problems and ascertain the role of the government in each instance
- D. illustrate the interaction of supply and demand and its effect on price through use of simple models
- E. illustrate the various types of economic markets and describe their roles in the overall economy
- F. study the role of American labor unions, the farm problem and the "social security" problems
- G. develop the ability to think for himself, according to economic analysis, rather than expect a "pat" answer. For some problems, there may be more than one "correct" answer.
- H. demonstrate the ability to read and interpret graphs, charts and various economic indexes.
- I. become acquainted through individual and group projects with some of the "molders of economic thought."
- J. read extensively in outside sources on current economic issues at the federal, state and local levels.

### II. UNITS--TOPICAL OUTLINE

- A. The fact of scarcity
  - 1. How our economy solves the basic economic problems and what resources will be used
  - 2. How these basic problems are solved in various economies
    - a. a market-directed economy
    - b. a command economy
    - c. a mixed economy

\*The minimum acceptable standards should be determined by the individual teacher. Suggested standards are given in Chapter IV of this section.

B. Economic markets in a private enterprise economy

1. The role of incentives and competition
2. Economic concentration and monopoly

C. The role of government

1. Taxes
2. Government spending

D. Banking and the Federal Reserve

1. The role of money and credit
2. Savings and investing

E. Economic growth and stability

1. Gross National Product
2. Business cycles

F. Measures of national income

1. Problems of economic growth
2. Forces determining national production
3. Government budgets
4. Monetary policy
5. Fiscal policy

G. The distribution of income

H. The role of organized and unorganized labor

1. Historical role
2. Wages and labor unions
3. Labor legislation

I. The farm problem

J. International trade

K. Special economic problems

1. The low-income family

## Economics

2. Social Security
  3. Problems of employment
- L. Comparative economies
1. Capitalism
  2. Socialism
  3. Communism
- M. Under-developed economies

### III. TEACHING METHODS

A variety in the methods of teaching economics can best guide the student in acquiring the abilities to think intelligently on economic issues. Materials in the textbook must be understood as a basis for further study. However, the order of the units need not be followed. Items of economic interest to the class or based on local economic issues may be the determinant for covering one unit before another. Newspapers and periodicals should be used in the economics class.

- A. Lecture--discussion method for basic concepts in the text
- B. Socio-drama and skits depicting such issues as labor-management sessions of collective bargaining, a corporation's board of directors meeting or a legislative session presenting the pros and cons of a tax proposal
- C. Oral and/or written reports on current economic news topics
- D. Individual study and research on a topic of economic import chosen by the student
- E. Panels to present opposing sides on controversial issues are effective
- F. Debates and use of an adversary approach on controversial issues
- G. Guest speakers from agriculture, industry, government or labor can effectively contribute to a class learning if such occasions are carefully planned
- H. Field trips to a bank, Federal Reserve Bank, or to a local industry to aid in greater understanding. Often a small group or committee designated to make the trip and report back to the class is more effective and gives more responsibility to the individuals in obtaining all the significant data, organizing it and reporting observations to the class
- I. The contract plan where the student actually signs a contract for the amount of work he intends to complete for a specific grade. This is over and above the minimal textbook/workbook learnings. This technique works well where independent study has been successfully developed
- J. Maintenance of a good classroom library which provides ready access to resource materials
- K. Use of class studies to illustrate a point of theory; i.e., the Cigarette Case and Price Fixing or the Railway Dispute and Automation
- L. Use of films and filmstrips; also, the overhead projector to illustrate various charts, diagrams and graphs



#### IV. EVALUATION, STANDARDS OF PERFORMANCE, TESTING AND GRADING

- A. Use of a pre-test, not one accompanying the text, before the study begins to determine what level of economic understanding is already present; and an achievement test at the end of the course to measure the degree of increase.
- B. Teacher- and publisher-constructed tests may be used to measure basic learning (vocabulary, concept of supply and demand).
- C. The ability to read graphs and charts can be measured by supplying a variety of such forms and asking pertinent questions about them.
- D. Essay and problem-type tests may be given to evaluate economic understandings and measure student's ability to think critically and organize data logically.
- E. Questions on economic situations can be constructed to test the ability of the students to distinguish between statements of fact and statements of opinion, between probable conditions and theoretically assumed ones, and between actual experience and imaginary situations.
- F. Evaluation can be made of student participation on a panel, or in a debate on a controversial issue illustrating logical organization and objective economic reasoning devoid of emotionalism.

#### V. TEXTBOOKS AND TEXTBOOK REFERENCES

##### Textbooks

Alexander, Albert and Others. *The Modern Economy in Action*. Pitman Publishing Co., New York, N.Y., 1968.

Brown, James E. and Harold A. Wolf. *Economics: Principles and Practices*, Charles E. Merrill Publishing Co., Columbus, Ohio, 1968.

Lindholm, Richard W. and Paul Driscoll. *Our American Economy*. Harcourt, Brace and World, New York, N.Y., Third Edition, 1967.

Mortenson, C.E. and Others. *Understanding Our Economy*. Houghton Mifflin Co., Boston, Mass., 1967.

##### Textbook References

Goodman, Kennard E. and C. Lowell Harris. *Economics*. Ginn and Co., Boston, Mass., 1963.

Kennedy, John W., and Others. *Applied Economics*. South-Western Publishing Co., Burlingame, California, Seventh Edition, 1967.

Leith, Harold R. and R. Pierce Lumpkin. *Economics U.S.A.* McGraw-Hill New York, N.Y., 1968.

Unks, Gerald. *The Economic Process: Teachers' Resource Book*. Scott, Foresman & Company, New York, N.Y., 1969.

## Economics

### Other References

- Ammer, Dean S. *Readings and Cases in Economics*. Ginn and Company, Boston, Mass., 1966.
- Allen, Frederick Lewis. *The Big Change 1900-1950*, Bantam Books, New York, N.Y., 1962.
- Cobleight, Ira. *Guide to Success on the Stock Market*. Avon Books, New York, N.Y., 1959.
- Council for the Advancement of Secondary Education. *Beginning Reading in Economics*. McGraw-Hill, New York, N.Y., 1961.
- Engel, Louis. *How to Buy Stocks*. Bantam Books, New York, 1959.
- Galbraith, John Kenneth, *The Affluent Society*. Mentor Books, New York, N.Y., 1958.
- Kennedy, Robert. *The Enemy Within*. Popular Library, New York, N.Y., 1960 (unions).
- Lilienthal, David. *Big Business--A New Era*. Pocket Books, New York, N.Y., 1953.
- Merrill, Edward H. and Van R. Halsey. *Responses to Economic Collapse: The Great Depression of the 1930's*. Heath and Company, Boston, Mass., 1964.
- National Industrial Conference Board. *Economic Almanac*. (issued annually, Washington. D. C.)
- Overstreet, Harry and Bonaro. *What We Must Know About Communism*. Pocket Books, New York, N.Y. 1962.
- Packard, Vance. *The Hidden Persuaders*. Cardinal Books, New York, N.Y., 1959.
- Packard, Vance. *The Status Seekers*. Cardinal Books, New York, N.Y., 1959.
- Robinson, Morton and Others. *Introduction to Economic Reasoning*. Brooking Institution, Washington, D.C., revised 1959.
- Soule, George. *Ideas of the Great Economists*. New American Library, New York, New York, 1952.
- Theobald, Robert. *The Rich and the Poor: Economics of Rising Expectations*. Mentor Publications, New York, N.Y., 1960.
- U.S. Government Printing Office. *Economic Report of the President*. Washington, D. C.

## VI. BOOKLETS, PERIODICALS, JOURNALS' MAGAZINES, AND MONOGRAPHS

### Booklets

*The Story of American Banking. Using Bank Services. How to Make the Most of Your Money. You and Your Bank. How Banks Help. You, Money and Prosperity.* American Bankers Association, New York.

*Sustaining Prosperity. The Mechanics of Inflation. The Economics of the Money Supply. Price Control and Inflation.* Chamber of Commerce of the United States, Washington, D. C.

*Open Market Operations. The Story of Checks.* The Federal Reserve Bank of New York.

*The Price System. Unemployment in Prosperity--Why? Gold! Automation The New Poverty. The Balance of Payments. The National Debt.* The Federal Reserve Bank of Philadelphia.

*Suggestions For a Basic Economic Library for Secondary Schools. Economic Education in the Schools, 1961. Study Materials for Economic Education in the Schools, 1961. 1962 Annotated Bibliography of Materials in Economic Education. 100 Selected Films in Economic education. Economic Education Experiences of Enterprising Teachers. A Teachers Guide to Economics in the Business Education Curriculum.* Joint Council On Economic Education, 1212 Avenue of the Americas, New York.

*Road Maps of Industry.* (issued bi-monthly) National Industrial Conference Board, Washington, D.C.

*You and the Investment World. Capitalists: Investors in the Nation's Business. Buying and Selling Stocks. Investing for American Families. The Investor in American History.* New York, N.Y. 10005.

Many of the above mentioned booklets may be secured in classroom quantities.

#### Periodicals

*The New York Times.* Business section of the Sunday edition.

*National Observer*

*Wall Street Journal*

*U. S. News and World Report*

*Newsweek*

*Fortune*

*Business Week*

*Changing Times*

*Time*

#### Organizations Active in Publishing Economic Materials

American Economics Association, 629 Noyes Street, Evanston, Ill., 60201

American Federation of Labor and Congress of Industrial Organizations, 815 Sixteenth Street, N.W., Washington, D.C. 20006

Board of Governors of the Federal Reserve System, Washington, D. C. 20006

Federal Reserve Banks (publications are issued by each of the twelve district banks)

Joint Council on Economic Education, 1212 Avenue of the Americas, New York, N.Y. 10036

Committee for Economic Development, 711 Fifth Avenue, New York, N.Y. 10002

National Association of Manufacturers, Two East 48th Street, N.Y. 10017

## Economics

National Industrial Conference Board, Inc., 845 Third Avenue, New York, N.Y. 10022

United States Chamber of Commerce, 1615 H Street, N.W., Washington, D.C. 20006

### References for the Latest Statistics

*The Federal Budget in Brief.* Bureau of the Budget.

*Monthly Labor Review.* Bureau of Labor Statistics.

*Economic Forces in the U S In Facts and Figures.* (annual) Bureau of Labor Statistics.

*Economic Indicators.* (monthly) Council of Economic Advisers.

*Annual Report to the President.* Council of Economic Advisers.

*Consumer Price Index.* Department of Labor.

### Monographs

Monograph 92, *Visual Aids for Business and Economic Education.* South-Western Publishing Company, Cincinnati, Ohio, revised, 1961.

Monograph 104, *Toward Better Economic Education.* South-Western Publishing Company, Cincinnati, Ohio, 1961.

Monograph 122, *The Use of an Adversary Approach in Teaching Economics.* South-Western Publishing Company, Cincinnati, Ohio, 1970.

## VII. FILMS, FILMSTRIPS, TAPES, RECORDS, TRANSPARENCIES, OPAQUE PROJECTIONS, CHARTS AND MODELS

Addresses from which films may be ordered:

Association Films, Inc., 347 Madison Avenue, New York, N.Y.

Bailey Films, Inc., 6509 DeLongpre Avenue, Hollywood, Calif.

Current Affairs Films, Inc., 527 Madison Avenue, New York, N.Y.

Coronet Films, Coronet Building, Chicago, Ill.

Pat Dowling Pictures, 1056 S. Robertson Blvd., Los Angeles, Calif.

Encyclopedia Britannica Films, Inc., 1150 Wilmette Avenue, Wilmette, Ill.

Ford Motor Co., Motion Picture Dep., Dearborn, Michigan

Household Finance Corp., 919 N. Michigan Ave., Chicago, Ill.

International Film Bureau, Inc., 332 S. Michigan, Chicago, Ill.

Institute of Life Insurance, Education Division, 488 Madison Ave., New York, N.Y. 10012

McGraw-Hill Book Co., Text-Film Dept., 330 West 42 Street, New York, N.Y. 10036

Modern Talking Picture Service, Inc., 1205 N. 45, Seattle, Wash., 98103

State Film Library, Office of the Superintendent of Public Instruction, Helena, Mont., 50601

#### Transparencies

Set of 50 two-color transparencies illustrating basic economic concepts and principles, South-Western Publishing Company, Cincinnati, Ohio

#### Records

*I Can Hear It Now.* (12-inch LP record) Economics and other problems from 1933 to 1945. Columbia Records, 799 Seventh Avenue, New York, N.Y.

### VIII. EQUIPMENT AND SUPPLIES

#### A. Basic Equipment

1. Classroom with sufficient furniture to allow each student writing space
2. Movie projector and screen
3. Overhead projector and transparencies
4. Current periodicals and resource material for projects and reports
5. Ample shelf space for the classroom library of economic books and pamphlets

#### B. Supplies

1. Paper, colored pencils, other materials for student use in construction of graphs and charts
2. Bulletin boards for display purposes
3. Chalkboards and various colored chalks

### IX. LAYOUT AND FACILITIES

It is suggested that any classroom where the desks or furniture may be arranged in a circle, U or semi-circle for discussion be used.

Black-out curtains or drapes must be provided so films may be shown in the classroom. Otherwise, facilities and equipment would be that of any standard classroom.



# CONSUMER ECONOMICS

One semester or one year

Grades 11 or 12

Basic

Consumer economics is offered for the purpose of developing in-depth understanding of one's personal adjustment as a consumer to the economic order in which he lives. This course is designed to prepare students for effective consumer citizenship. Consumer economics is of value to all students. The course tends to upgrade personal economic skills, and has a desirable effect on the economy as a whole. Informed consumers give better direction to the entire economy.

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## Consumer Economics

### I. OBJECTIVES\*

The student will:

- A. develop an understanding and appreciation of our current economic system and the consumer's role and responsibilities in a free enterprise system.
- B. demonstrate how to be a better buyer, how to make more effective purchases, how to use and manage his income to the best advantage and how to understand his buying habits in relation to his own goals and to the society in which he lives
- C. demonstrate an understanding of the government's role in protecting and advancing consumer welfare
- D. review and discuss topics of interest to the consumer.

### II. UNITS--TOPICAL OUTLINE

- A. Foundations of consumer education
  1. Developments which have made consumer education necessary and purposes it may strive to serve
  2. A study of consumers--their income and resources, their habits and motivations; in general, how they consume and how their consumption might be improved
  3. Operation of our business system
- B. Management of personal financial affairs
  1. Budgeting
  2. Money management
  3. Use of consumer credit
  4. Insurance
  5. Social Security
  6. Savings and Investments
  7. Money, banking and credit
- C. Obtaining information and guidance on consumer needs
  1. Advertising--propaganda analysis
  2. Using standards, specifications and labels
  3. Using services of agencies that inform and guide consumers

\*The minimum acceptable standards should be determined by the individual teacher. Suggested standards are given in Chapter IV of this section.



- D. Purchasing goods and services
  - 1. Purchasing foods and drugs
  - 2. Purchasing clothing
  - 3. Purchasing insurance
  - 4. Purchasing automobiles and accessories
  - 5. Purchasing leisure-time merchandise and facilities
- E. Problems of renting versus buying, improving and maintaining a home
- F. Government and the consumer
  - 1. Services, i.e., research and publications
  - 2. Taxes--direct and indirect
  - 3. Laws protecting the consumer
- G. Law and the consumer
  - 1. Basic law for the consumer
  - 2. The contract and the warranty

### III. TEACHING METHODS

- A. Role playing
- B. Group discussion
- C. Field trips
- D. Case problems
- E. Outside speakers
- F. Student projects--individual and group
- G. Lecture/discussion sessions
- H. Use of current audio-visual aids
- I. Use of actual merchandise

### IV. EVALUATION, STANDARDS OF PERFORMANCE, TESTING AND GRADING

- A. Learning activities used in developing a topic may be evaluated by means of
  - 1. teacher evaluation
  - 2. student evaluation
  - 3. tests or quizzes to measure progress
  - 4. oral and written reports of student projects

## Consumer Economics

- B. Workbook exercises may be used as pretests, as reviews or to assist the student in his textbook reading assignments.
- C. Achievement tests may be obtained from textbook publishers.
- D. Essay or problem tests should be included to reveal
  - 1. understanding and application of principles and concepts
  - 2. identification and approach to problem solving
  - 3. ability to express ideas and thoughts clearly.
- E. Open-book tests will measure the resourcefulness of the student in applying facts and knowledge and in utilizing sources of information.

## V. TEXTBOOKS AND TEXTBOOK REFERENCES

### Textbooks

Warmke and others. *Consumer Economic Problems*. Eighth Edition, South-Western Publishing Co., 1971.

Wilhelms, Fred T., Heimerl, Ramon P., and Jelley, Herbert M. *Consumer Economics*. Third Edition, Gregg Division of McGraw-Hill Book Company, Inc., 1966.

### References\*

Dodd, Kennedy and Olson. *Applied Economics*. Sixth Edition, South-Western Publishing Company.

Donaldson and Pfahl. *Personal Finance*. Third Edition, The Ronald Press Company, 1966.

Feinberg, Daniel. *Consumer Economics*. Holt, Rinehart and Winston, 1964..

Kennedy, Olson and Dodd. *Applied Economics*. Seventh Edition, South-Western Publishing, South-Western Publishing Company, 1967.

Leith and Lumpkin. *Economics USA*. McGraw-Hill Book Company, 1968.

Lindholm and Driscoll. *Our American Economy*. Harcourt, Brace and Co.

Potter and Corbman. *Textiles; Fiber to Fabric*. Fourth Edition, Gregg Division of McGraw-Hill Book Company, Inc., 1967.

Ulmer, M.J. *Economics: Theory and Practice*. Second Edition, Houghton Mifflin Company, 1967.

Wingate, Gillespie and Addison. *Know Your Merchandise*. Gregg Division of McGraw-Hill Book Company, Inc., 1964.

\*Check references for Economics listed at the end of that guideline.

## VI. BOOKLETS, PERIODICALS, JOURNALS, MAGAZINES AND MONOGRAPHS

## Booklets

*Money, Banking, and Credit. Family Financial Education Program, Managing Personal Income.* (teacher guide, 60 cents, student problem book, 35 cents) *Accepting Credit Responsibility.* (teacher guide, 60 cents, student problem book, 35 cents.) *Public Affairs Division,* Continental Illinois National Bank and Trust Company of Chicago, Lock Box H, Chicago, Ill, 60690.

*Complete Information About HFC's Money Management Programs.* (lists several booklets that can be ordered for 25 cents each). *Your Guide for Teaching Money Management.* (15 cents) Household Finance Corporation, Prudential Plaza, Chicago, Ill 60601.

*Using Bank Services* (teacher's guide), *Personal Money Management, Materials on Money & Banking for Elementary and Secondary Schools.* American Banking Association, 12 East 36 Street, New York, N.Y. 10016.

*Credit: Master or Servant, 1966.* U.S. Printing Office, Washington, D. C.

*Catalogue of Educational Aids on Finance Facts.* (free) National Consumer Finance Association, Educational Service Division, 701 Solar Building, 1000 16th Street N.W., Washington, D. C.

*Consumer, Beware.* (guide to installment buying, 15 cents) AFL-CIO 815 16 Street N.W., Washington, D.C.

*Keeping Your Money Healthy.* (free) Federal Reserve Bank of New New York, 33 Liberty Street, New York, N.Y. 10005.

*Moneys of the World.* (free) Chase National Bank, 1254 Avenue of the Americas, New York, N.Y. 10020.

*What are Credit Unions and How Can We Use Them?* (free) Credit Union National Association, 1617 Sherman Avenue, Madison, Wisconsin 53704.

*About This Stock and Bond Business.* (free) Merrill, Lynch, Pierce, Fenner & Smith, Inc., 70 Pine Street, New York, N.Y. 10005.

*Buying and Selling.* (free), *Stocks: Common and Preferred.* (free) *Investing for American Families.* (free) *The New York Stock Exchange.* (free) *Sources of Information on Investments.* (free) New York Stock Exchange, 11 Wall Street, New York, N.Y. 10005.

## Insurance

*Accident & Health Insurance.* facts booklet, Association of Better Business Bureaus, Inc., 723 Chrysler Building, New York, N.Y.

*29 Gaps in Your Bridge to Security.* (a collection of stories about gaps in personal and business insurance protection)

*Insurance: Your Career.* American Motorists Insurance Company, Public Relations Department, 4750 Sheridan Road, Chicago, Ill.

## Consumer Economics

*Catalog of Teaching Aids.* (free) *Handbook of Life Insurance.* (basic reference for high school teacher, single copy free, additional copies 25 cents) *Policies for Protection, Sharing the Risk.* (on principle and purpose of life insurance) *Source Book of Health Insurance Data.* (published annually, free) *The Man Who Runs Interference.* Institute of Life Insurance, Educational Division, 488 Madison Avenue, New York, N.Y. 10022.

*Casualty Insurance Handbook.* (free) Insurance Information Institute, 60 John Street, New York, N.Y. 10038.

## Social Security

Secure the following from your local Social Security Office (free):

OASI 872     *Essentials of Social Security in the United States*  
OASI 36     *Financing your Social Security Benefits*  
OASI 23b     *Social Security Benefits*  
OASI 855     *Social Security Benefits--How You Earn Them*  
OASI 29     *If you Become Disabled*  
OASI 413     *Teacher's Social Security Kit Folder*

## Taxes

*The Story of Taxes.* (free) E.I. Dupont de Nemours & Company, Wilmington, Delaware 19801.

Request teaching materials each year in the fall from Internal Revenue Service, Helena, Mont. 59601 (or Ogden, Utah).

Request forms from State Board of Equalization, Helena, Mont. 59601.

## Miscellaneous

*Hotel Red Book.* American Hotel Directory.

*Official Airline Guide.* American Aviation publishes monthly.

*Economic Indicators, Survey of Current Business, Statistical Abstract of the United States.* Superintendent of Documents, U.S. Government Printing Office, Washington, D.C.

## Montana Almanac

*The World Almanac and Book of Facts.* 135 Barclay Street, New York, N.Y.

Periodicals, Journals and Magazines

Local, State and National Newspapers.

*Business Digest.* 681 Market Street, San Francisco, Calif. 94105.

*Business Education World.* 330 West 42 Street, New York, N.Y. 10036

*Business Management.* 22 East Putnam Avenue, Greenwich, Conn., 06830.

*Business Periodical Index.* 950 University Avenue, New York, N.Y. 10452.

*Changing Times.* 1729 H Street N.W., Washington, D. C. 20007.

*Journal of Economic History.* 100 Trinity Place, New York, N.Y. 10006.

*Nations Business.* 1615 H Street, N.W., Washington, D. C. 20007.

*Fortune Magazine*

*Harvard Business Review*

*Consumers Guide*

*Consumer Report*

*Annual Consumer Buying Guide*

### **Monographs**

Monograph No. 110--*Some Concepts Essential to a Basic Understanding of Economics*,  
South-Western Publishing Company.

### **Sources of Publications on Economic Topics**

The American Economic Foundation, 51 East 42 Street, New York, N.Y. 10017

Banks & Insurance Companies

Better Business Bureaus, 723 Chrysler building, New York, N.Y. 10017

Montana Chamber of Commerce, Box 1730, Helena, Mont. 69601 (also local)

Consumers' Research, Washington, N.J. 07882

Labor Organizations

National Association of Manufacturers, 227 Park Avenue, New York, N.Y. 10017

National Industrial conference Board, Inc., 845 Third Avenue, New York, N.Y. 10022

National Schools Committee for Economic Education, 25 West 43 Street, New York, N.Y. 10036

Public Affairs Institute, 312 Pennsylvania Avenue, S.E., Washington, D. C. 20003

## **VII. FILMS, FILMSTRIPS, TAPES, RECORDS, TRANSPARENCIES, OPAQUE PROJECTIONS, CHARTS AND MODELS**

Directory of 16mm Educational Sound Film, State of Montana Audiovisual Library, Office of the Superintendent of Public Instruction, Helena, Montana 59601

Educational Film Index, Audiovisual Education Center, The University of Michigan and Instructional Media Center, Michigan State University, East Lansing, Michigan.

Educators Progress Service, Inc., Randolph, Wisconsin 53956

## Consumer Economics

Household Finance Corporation, Prudential Plaza, Chicago, Ill. 60601.

McGraw-Hill Films, 330 West 42nd Street, New York, N.Y. 10036.

Mountain Plains Educational Media Council Film Catalog.

National Audiovisual Center, Washington, D.C. 20409.

National Information Center for Educational Media Index to Overhead Transparencies, University of Southern California, Los Angeles, California 90007.

South-Western Publishing Company Catalog, Burlingame, Calif. 94010.

Taylor Films Catalog, 1009 Dakota Avenue, South Huron, S. Dak. 57350.

## VIII. EQUIPMENT AND SUPPLIES

Appropriate desks and chairs

Demonstration desk, table, or area

Overhead projector (portable)

Filmstrip projector

Slide projector

Movie projector

Suitable projection screen

Movable projection stand

Tape Recorder

Record Player

Appropriate maps and charts

Simple equipment for art work, poster and displays

Radio and/or television if feasible

Other minor office supplies as they may be necessary

## IX. LAYOUT AND FACILITIES

The layout of a room that is to be used for Consumer Economics is secondary in nature, because any room that is large enough to accommodate the class size and is properly lighted will generally serve the purpose quite well. However, it is imperative that the room have sufficient facilities that may be warranted by the class and class activities.

Recommended facilities include the following:

Bulletin board space

Blackboard

Sufficient storage space

Sufficient filing space

Display space

Flannel board

Book shelves

Blackout cuttrains

# BOOKKEEPING

One year

Grades 11 or 12

Basic and Vocational

Bookkeeping provides an understanding of the basic principles of the bookkeeping cycle from the analysis and recording of business transactions to the preparation and interpretation of the financial statements and supporting data, including an introduction to flow charts and systems. Attention is given to payroll deductions and the related taxes. Bookkeeping should acquaint the student with automated and electronic data processing procedures.

Emphasis of economic understanding should be part of every phase of bookkeeping whether or not a course in economics is offered separately. Bookkeeping students learn "why" as well as "how." A unit on income taxes may be taught in January or February.

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## Bookkeeping

### I. OBJECTIVES\*

The student will

- A. demonstrate an understanding of the bookkeeping equation and bookkeeping cycle
- B. develop a comprehensive vocabulary of bookkeeping and business terms
- C. use business papers and forms commonly used in business transactions and, by thinking logically, explain the "why" as well as the "how" of the solution
- D. demonstrate desirable business attitudes, work habits and ideals needed in business such as regular attendance, neatness, legibility, accuracy and honesty, use time wisely, meet obligations promptly, follow instructions, accept responsibility, keep information confidential and get along with others
- E. differentiate between the manual and automated data processing cycle in accounting by listing, as described in the text, the tools and/or instruments used in
  1. processing source documents
  2. recording data
  3. sorting and summarizing
  4. reporting
- F. complete these listings in 15 or 20 minutes with a high degree of accuracy
- G. prepare personal income tax returns.

### II. UNITS--TOPICAL OUTLINE

- A. The bookkeeping cycle--simplest form
  1. Bookkeeping equation
  2. Opening entry
  3. Analyzing and journalizing transactions
  4. Posting
  5. Proving accuracy of posting
  6. Six-column work sheet
  7. Financial statements
  8. Closing the ledger

\*The minimum acceptable standards should be determined by the individual teacher.



- B. The bookkeeping cycle--special journals and subsidiary ledgers
  - 1. Purchases Journals
  - 2. Cash Payments Journal
  - 3. Sales Journal
  - 4. Cash Receipts Journal
  - 5. Miscellaneous entries in general Journal
  - 6. Post of general and subsidiary ledgers
  - 7. Checking accounts and reconciliation of bank statements
  - 8. Work sheet with adjustments
  - 9. Financial reports--merchandising business
  - 10. Adjusting and closing entries
- C. Personal income taxes
- D. Introduction to automated data processing
  - 1. Automated data processing in bookkeeping
  - 2. Automated data processing systems
- E. The combination journal for transactions affecting petty cash, sales, purchases and payroll
- F. Special bookkeeping transactions
  - 1. Fixed assets and depreciation
  - 2. Disposing of fixed assets
  - 3. Bad debts, valuation and aging of accounts receivable
  - 4. A cash register bookkeeping system
  - 5. Sales taxes
  - 6. Notes and interest
  - 7. Accrued income and accrued expenses
  - 8. Wise use of consumer credit
- G. Partnerships, corporations and cooperatives

### III. TEACHING METHODS

The mechanical aspects of bookkeeping and the development of the understanding of the uses to be made of this data are both important and can and should be developed together. However, different methods of instruction are required in developing each area.

- A. Visual aids should be used throughout the course. The chalkboard and overhead projector can be used daily. Bulletin boards and posters effectively illustrate points. Students' work may be displayed. Timely filmstrips and motion pictures are valuable.
- B. T-accounts are often the best method of explaining a bookkeeping concept.
- C. Practice sets review all the components learned and serve to tie together all the phases of bookkeeping. They may be worked individually or by groups.
- D. Class reports, panels, debates and discussion may be used.
- E. Students may check their own work or that of others. Instructor may spot check.
- F. The students who complete the basic assignments may, as a special project, set up a bookkeeping system for a typical local business.
- G. Field trips, especially to a bank or a business with computers, are of great interest. Talks by businessmen about their bookkeeping procedures and local surveys also add to bookkeeping knowledge.

### IV. EVALUATION, STANDARDS OF PERFORMANCE, TESTING AND GRADING

- A. The most common criteria for assigning grades in bookkeeping are examinations, homework assignments, class recitation and practice sets or projects.
- B. Examinations are in two categories: those published by the textbook companies, usually objective unit tests, but also problem tests over the unit; and teacher-made tests.
- C. Promptness in handing in work, accuracy, legibility and neatness all have a part in grading. Homework assignments need not be checked in great detail. Homework, class recitation and discussion may be evaluated by a plus, a minus, a zero or other indication of participation or accomplishment.
- D. Practice sets or projects review the work presented. They may be checked for accuracy and legibility. Objective tests, from publishers or teachers, may be given on the practice sets.

### V. TEXTBOOKS AND TEXTBOOK REFERENCES

#### Textbooks

Boynton and others. *20th Century Bookkeeping & Accounting*, 23rd ed. South-Western Publishing Company. Study guides and working papers for text. Practice sets that accompany text: Spencer Athletic Goods Set with business papers and blanks, Taylor Hardware Set with business papers (2nd semester) and Weston Leather Goods Set with business papers (2nd semester).

Freeman, Hanna and Kahn. *Bookkeeping and Accounting*. Gregg Division McGraw-Hill Book Company, Inc., 1968. Workbooks for *Bookkeeping and Accounting, 10/12*. Practice sets that accompany text: Allen Electronic Service, Judd Paint Company, Home Heating Company and Payroll Systems and Procedures. Comprehensive tests from company.

Jannis and Miller. *Fundamentals of Modern Bookkeeping*. Pitman Publishing Corporation. Workbooks to accompany text. Testing program of 16 tests.

Olson, M.C. *Bookkeeping--Introductory*. Prentice-Hall.

United States Government, Internal Revenue Service. *Teaching Taxes*.

#### References

Audruss, Harvey A. *Ways to Teach Bookkeeping and Accounting*. South-Western Publishing Company.

Boynton, Lewis. *Methods of Teaching Bookkeeping*. South-Western.

Douglas and others. *Teaching Business Subjects*. Prentice-Hall, 1958.

Musselman and Hanns. *Teaching Bookkeeping and Accounting*. Gregg Publishing Division, McGraw-Hill Book Company, Inc., 1960.

Walch, J. *How to Teach Bookkeeping*.

Baron and Steinfield. *Clerical Record Keeping*. South-Western Publishing Company, 1965.

Boynton and others. *20th Century Bookkeeping and Accounting*. Advanced Course, South-Western, 1968.

Carson and others. *Secretarial Accounting*. South-Western, 1967.

Clow and others. *Gregg Accounting, Advanced Course*, McGraw-Hill, 1969.

Heiges and others. *General Record Keeping*. South-Western, 1969.

Perry and others. *Clerical Bookkeeping*. Pitman, 1962.

Zelliott and Leidner. *Bookkeeping Advanced*. Prentice-Hall.

## VI. BOOKLETS, PERIODICALS, JOURNALS, MAGAZINES AND MONOGRAPHS

### Monographs (South-Western Publishing Company)

No. 118 *Bookkeeping Instruction in the Twentieth Century and the Evolution of Twentieth Century Bookkeeping and Accounting*.

No. B855 *Dictionary of Bookkeeping and Accounting Terminology*.

No. B652 *Drills and Problems in Bookkeeping and Accounting*. Arthur E. Carlson.

No. 85 *Good Classroom Practices in Business Education*.

## Bookkeeping

No. 96 *Helpful Hints in Teaching Bookkeeping and Accounting.*

No. 62 *Specific Teaching Methods for Bookkeeping and Accounting.*

No. 101 *The Teaching of Bookkeeping, 1960.*

No. 92 *Visual Aids for Business and Economic Education.*

## Magazines

*Business Education Forum.* National Business Education Association, National Education Association, 1201 Sixteenth Street, N.W., Washington, D. C.

*Business Education World.* Gregg Division, McGraw-Hill Book Company, Inc., 330 West 42nd Street, New York, N.Y.

*Journal of Business Education.* 34 N. Crystal Street, East Stroudsburg, Pa.

*Office, The.* Office Publications, Inc., 232 Madison Avenue, New York, N.Y.

*Pitmanite.* Pitman Publishing Company, New York, N.Y.

*Secretary, The.* The National Secretaries Association, 10214 Crane Road, Kansas City, Missouri.

*Today's Secretary.* Gregg Division, McGraw-Hill Book Company, Inc., 330 West 42 Street, New York, N.Y.

*Balance Sheet, The.* South-Western Publishing Company, 11 Guittard Road Burlingame, Calif.

## Booklets and Periodicals

"Accounting May be the Right Field for You." "Careers in Accounting--a Field with Spectacular Yet Solid Growth." "CPA." (describes a film.) "The Profession of Accounting." Maurice H. Stans. "To Be or Not To Be a CPA." Maurice H. Stans. "Young Eyes on Accounting." American Institute of Certified Public Accountants, 720 Madison Avenue, New York, N.Y.

"Accounting as a Career." 1965. Boston University, School and College Relations, 705 Commonwealth Avenue, Boston, Mass.

"Accounting Teachers Guide." South-Western Publishing Company.

"Accounting--The Language of Business and Accounting Terminology Bulletins." American Institute of Accountants, 270 Madison Avenue, New York, N.Y.

"Accounting and Bookkeeping." National Federation of Business and Professional Women's Clubs, Inc., 1819 Broadway, New York, N.Y.

"Accuracy as a Career Field," George A. Spaulding, National Association and Council of Business Schools, 1601 16th Street, N.W., Washington, D.C.

"Be Wise, Safeguard Your Check Procedure." International Business Machine Corp., 590 Madison Avenue, New York, N.Y.

Bookkeeping Charts--South-Western

Bookkeeping Charts--McGraw-Hill book Company

"Dialaccount." Basic accounting and bookkeeping aid. A useful guide for students. D.C. Heath & Company.

"6 Easy Ways to Recognize a Bad Check." Fraud Detection and Prevention Bureau, 2515 West 82nd Street, Chicago, Ill.

Employment Outlook in Accounting. Bulletin No. 1048 and Public Accounting Services for Small Manufacturers. Supt. of Documents, Bureau of Labor Statistics, Washington, D.C.

"Exhibits and Business Forms." Business Education Visual Aids.

Financial Statements--George F. Cram Company, Inc.

"Facts You Should Know About Borrowing and Budgeting." (2 booklets) Better Business Bureau, 52 Chauncy Street, Boston, Massachusetts.

"Good Checks and Bad Money." Aetna Life Affiliated Companies, Hartford, Connecticut.

"Job Guide for Young Workers." Superintendent of Documents, U.S. Government Printing Office.

"Occupational Brief on Bookkeeper." Chronicle Guidance Publications, Inc., Moravia, N.Y.

"Operating Small Businesses." (Pamphlet No. 41, Establishing and Operating a Bookkeeping Service) Superintendent of Documents, U.S. Printing Office, Washington, D.C.

"Principles of IBM Accounting." International Business Machines Corp., 590 Madison Avenue, New York, N.Y.

"Record Keeping for Retail Stores." Superintendent of Documents, U.S. Government Printing Office.

Reprint of Articles. New York Life Insurance Company, Public Relations Department, 51 Madison Avenue, New York, N.Y. 10016.

"Safeguard Against Employee Dishonesty in Business." The Surety Association of America, 60 John Street, New York, N.Y.

"Small Business Management Series." (16 booklets) Superintendent of Documents, U.S. Government Printing Office.

Truth in Lending, 1966. Pamphlet No. 17. Dr. Richard L.M. Morse, Department of Family Economics, Kansas State University, Manhattan, Kansas.

## VII. FILMS, FILMSTRIPS, TRANSPARENCIES, CHARTS AND POSTERS

### Films

"At Any Given Moment." "How to Use Your Bank." "Journal--First Lesson." "Meaning of Percentages." Business Education Films, 5113 16th Avenue, Brooklyn, N.Y. 11204.

## **Bookkeeping**

"Accounting: Basic Procedures." "Bookkeeping and You." "Banks and Credit." Coronet Instructional Films, 65 East South Water Street, Chicago, Illinois 60601.

"Bookkeeping and Accounting." Mahnke Productions, 215 Third Street, Des Moines, Iowa 50302.

"Occupations and Opportunities: Bookkeeping." Baily Films, 6509 DeLongpre Avenue, Hollywood, Calif. 90028.

## **Filmstrips**

"Accounting Cycle Direct Ledger Entry." "Bookkeeping and Accounting Errors." "Controlling Accounts." "How to Balance Accounts." "Interest--60 Day 6% Method--Parts I and II." "Introduction to Accounting." "Posting--One Journal, One Ledger." Business Education Films, 5113 16th Avenue, Brooklyn, N.Y. 11204

"Accounting Series." "Bookkeeping Series." "Business Education Series." McGraw-Hill Book Company, 330 West 42nd Street, New York, N.Y. 10036.

"Bookkeeping Cycle." South-Western Publishing Company, 11 Guittard Road, Burlingame, Calif. 94010.

"Collection of Data." City College of New York.

"Distribution Accounting." "Retail Accounts Receivable." International Business Machines, Film Activities, Department of Information, 590 Madison Avenue, New York, N.Y. 10022.

## **Transparencies**

"Bookkeeping Transparencies." South-Western Publishing Company, 11 Guittard Road, Burlingame, Calif. 94010.

"Bookkeeping Transparencies." Technifax Corporation, 195 Appleton Street, Holyoke, Mass. 01040.

"Transparencies for Bookkeeping." Pitman Publishing Corp., 20 East 46 Street, New York, N.Y. 10017.

"Transparencies for Bookkeeping." McGraw Hill Co., 330 West 42nd Street, New York, N.Y. 10036.

"Transparencies, Masters, for Bookkeeping." University of Kentucky

"Bookkeeping Transparencies." Technifax Corp., 195 Appleton Street, Holyoke, Mass., 01040.

## **Charts and Posters**

Bookkeeping Wall Charts. George F. Cram Company, Inc., 301 S. LaSalle Street, Indianapolis, Ind. 46206.

Cartoons. Special Teaching Aids, 3408 N. Potomac Street, Arlington, Virginia 22213.

Income Tax Return. Social Security Charts. Internal Revenue Service, District Office, Helena, Montana, or Regional Office, Ogden, Utah 84403.

## VIII. EQUIPMENT AND SUPPLIES

### A. Equipment

- Electric adding machine for 5 students
- Overhead projector
- Filmstrip projector
- Movie projector
- Projection screen
- File cabinets
- Desk trays
- Bulletin boards and chalkboards
- Below counter storage and overhead storage cabinets
- Open shelves and magazine rack
- Desks or tables
- Chairs
- Utility table

### B. Supplies

- Transparencies
- Filmstrips
- Adding machine tapes and ribbons
- Ruled bookkeeping forms, by package

## IX. LAYOUT AND FACILITIES

A standard, well-lighted classroom with adequate electrical outlets





# DATA PROCESSING

One semester

Grades 11 or 12

Basic

This course presents a background in the areas of automated data processing and manual data processing. The student will trace the development of data processing up to and including the electronic computer. He will explore some of the ways in which the computer is being used in business. He will examine the language systems that may be employed in communicating with data processing equipment. This course is vital to all business students but may be taken as an elective by any student interested in data processing.

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## Data Processing

### I. OBJECTIVES\*

The student will:

- A. become familiar with how data is processed by unit record sequences and electronic computers
- B. become acquainted with the changes that have taken place in processing data because of electronic computers
- C. develop, through the unfailing logic required by the computer, experience and skill in analyzing problems and laying out logical step-by-step solutions
- D. explore careers in which he needs to understand automated data processing, even though his job may not be directly connected with electronic computers
- E. investigate the job openings in data processing and the qualifications needed to fill them
- F. attain a basic foundation on which he can build in order to prepare himself for a career in electronic data processing.

### II. UNITS--TOPICAL OUTLINE

- A. Introduction to the course
  - 1. Definition of data processing
  - 2. Brief history
  - 3. Need for data processing
  - 4. Application of data processing
  - 5. Limitations of data processing
- B. Careers in data processing
  - 1. Types of jobs
  - 2. Required training
- C. Manual and mechanical data processing systems
  - 1. Basic operation
  - 2. Types of equipment

\*The minimum acceptable standards should be determined by the individual teacher. Suggested standards are given in Chapter IV of this section.

- D. Punched cards
  - 1. Card planning and layout
  - 2. Recording information on card
  - 3. Sorting and classifying data on card
- E. Other input media
- F. Processing data using unit record systems
  - 1. Keypunch
  - 2. Verifier
  - 3. Sorter
  - 4. Collator
  - 5. Tabulator
  - 6. Calculator
- G. The electronic computer system
  - 1. Features
  - 2. Types of computers
  - 3. Steps in system
  - 4. Equipment involved and its usage
- H. Input-output equipment
  - 1. Functions
  - 2. Devices
- I. Introduction of machine language
- J. Exploratory programming

### III. TEACHING METHODS

- A. Lecture to introduce new materials and concepts
- B. Discussion
- C. Simulation through the usage of practice sets
- D. Field trips to businesses and industries using E.D.P. equipment with a demonstration of the various E.D.P. equipment

## Data Processing

- E. Guest speakers
- F. Actual use of computer consoles
- G. Student reports on E.D.P.
- H. Use of films and filmstrips to illustrate usage of E.D.P. equipment

## IV. EVALUATION, STANDARDS OF PERFORMANCE, TESTING AND GRADING

- A. Use objective and subjective testing.
- B. Kits are available from publishers and machine companies.

## V. TEXTBOOKS AND TEXTBOOK REFERENCES

### Textbooks

- Arnold and others. *Modern Data Processing*. John Wiley and Sons, 1964.
- Bux. *Key-Punch Training Course*. Second Edition, South-Western.
- Bux. *Sorter and Tabulator Training Kit*. South-Western.
- Carter. *Data Processing for the Small Business*. McFadden-Bartnell Corporation, 1966.
- Cashman and others. *Data Processing: A Text and Project Manual*. Gregg.
- Data Processing Management Association. *Introduction to Electronic Data Processing*. Park Ridge, III., 1962.
- Davis. *Computer Data Processing*. Gregg
- Freeman and others. *Accounting 10/12 Part IV Business Data Processing Fundamentals*. Gregg.
- Kahn. *Business Data Processing: Basic Principles and Applications*. Gregg.
- Key-Cashman. *Project Manual for Basic Principles of Data Processing*. Gregg.
- Laurie. *Computers and Computer Languages*. South-Western, 1966.
- Levy. *Punched Card Equipment: Principles and Applications*. Gregg.
- Pactor and others. *Card-Punch Machine Operation*. Bookkeeping I, Gregg.
- Robichaud. *Understanding Modern Business Data Processing*. Gregg.
- Rowe. *Keypunch Projects*.
- Sanders. *Computers in Business*. Gregg.
- Swallow and Price. *Elements of Computer Programming*. Holt, Rhinehart and Winston, Inc., 1966.
- U.S. Government Printing Office. *Automatic Data Processing Glossary*.
- Wanous, Wanous & Wagner. *Fundamentals of Data Processing*. South-Western, 1971.

## VI. BOOKLETS, PERIODICALS, JOURNALS, MAGAZINES AND MONOGRAPHS

### Booklets

*Automation Dictionary*

*The Computer Comes of Age. Introducing . . .the Computer. Programming: Words that Move Machines.* IBM, Data Processing Division, 112 East Post Road, White Plains, N.Y.

*More About Computers.* IBM, Armonk, N.Y. 10505.

*Understanding Computers.* McGraw-Hill Book Company.

*You and the Computer.* General Electric Company, Schenectady, N.Y. 12305.

### Journals

*Business Education Forum.* 1201 - 16th Street N.W., Washington, D.C., 20006.

*Journal of Data Management.*

### Monographs

No. 114 - *A High School Orientation Course in Data Processing.* South-Western Publishing Company.

No. 116 - *Teaching of Automatic Data Processing in the High School.* South-Western Publishing Company.

## VII. FILMS, FILMSTRIPS, TAPES, RECORDS, TRANSPARENCIES, OPAQUE PROJECTIONS, CHARTS AND MODELS

*Automation.* U.S. Office of Education.

*Careers in Business Automation.* Modern Talking Pictures Service, Three East 54th Street, New York, N.Y. 10022.

*Introduction to Automatic Data Processing.* U.S. Defense Department.

*Principles of Electronic Data Processing.* IBM Corporation.

*This is Automation.* General Electric Company, Schenectady, N.Y. 12305.

*What Do You Want?* Sperry-Rand Corporation.

## VIII. EQUIPMENT AND SUPPLIES

Equipment listed would not be available in all schools. If it is not available in the school system, it is recommended that it be made available in a downtown business or on a time sharing basis with another school in the vicinity.

Keypunch  
Sorter  
Collator

### **Data Processing**

Verifier

Accounting machines

Magnetic tape equipment

Disc equipment

Telephone--for terminal hook-up

Computer efficient enough to handle all the projects that will be completed

Overhead projector and screen

Student tables and chairs

Chalkboards and bulletin boards

### **Supplies**

Computer cards

Magnetic tape

Paper tape

## **IX. LAYOUT AND FACILITIES**

Room adequate in space and wiring to provide for any equipment used

## BUSINESS LAW

One semester or full year course

Grades 11 or 12

Basic

Business law is a study of basic legal principles common to a broad base of everyday business activities in which an individual is likely to become involved. It can be useful to students for personal reasons and can be valuable as background information to individuals who are entering business careers.

The course helps make the student a better citizen as he realizes that laws are made for the protection of people and their property as well as for the punishment of wrongdoers.

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## I. OBJECTIVES\*

The student will:

- A. understand that a course of business law does not imply a lawyer's competence, but merely a basic introduction to law
- B. express the basic principles of business law and their application to the problems of everyday living
- C. avoid hasty decisions by withholding judgment until essential facts of the case have been presented
- D. identify legal rights and responsibilities in everyday living
- E. use a working vocabulary of the most frequently used legal terms
- F. develop an understanding of our judicial system
- G. use elementary business and legal forms that may be used without aid of an attorney
- H. use a variety of supplementary materials

## II. UNITS--TOPICAL OUTLINE

- A. Introduction
  - 1. Origin, development and meaning of business law
  - 2. Function of laws
  - 3. Classification of laws
    - a. Natural
    - b. Moral
    - c. Man-made
  - 4. The courts and business law
    - a. Enforcing rights of the individual
    - b. The system of courts
- B. Contracts
  - 1. Nature, definitions and classifications
  - 2. Necessary elements of a contract
    - a. Mutual agreement
    - b. Legality of subject matter
    - c. Consideration
    - d. Proper form
    - e. Competent parties

The minimum acceptable standards should be determined by the individual teacher. Suggested standards are given in Chapter IV of this section.



3. Formation of contracts
    - a. Capacity of parties
    - b. Persons of limited contractual capacity
      1. Minors
      2. Insane persons
      3. Intoxicated persons
      4. Aliens
      5. Convicts
      6. Married women and married men
  4. Agreement--offer
    - a. Mutual agreement
    - b. Offers
      1. Kinds of offers
      2. Communication of offers
      3. Acceptance of offers
      4. Termination of offers
    - c. Types of agreements
  5. Termination of contracts
  6. Remedies for breach of contract
- C. Bailments
1. Nature and types
  2. Parties, forms, acceptance, termination
  3. Mutual benefit bailments
  4. Hotel keepers
    - a. Duties
    - b. Insurance
    - c. Liabilities
  5. Common carriers
    - a. Duties, rights and liabilities
    - b. Bill of lading
    - c. General regulations for shipment
- D. Agency
1. Definition
  2. Creation
  3. Relationship of principal, agent and third parties
    - a. Duties
    - b. Liabilities
  4. Termination

## Business Law

- E. Negotiable instruments
  - 1. Nature and kinds
  - 2. Form and content
  - 3. Transfer
  - 4. Rights of holders
  - 5. Promissory notes
  - 6. Drafts and checks
- F. Sales
  - 1. Nature of sales contract
  - 2. Form of sales contract
  - 3. Ownership and risk of loss
  - 4. Warranties and product liability
  - 5. Consumer protection
    - a. Unfair practices
    - b. Federal food, drug and cosmetic act
    - c. Government standards
    - d. State and local laws
- G. Property and property rights
  - 1. Personal property
    - a. Transfer of title
    - b. Mortgages
    - c. Warranties
  - 2. Real property
    - a. Ownership, deeds and mortgages
    - b. Transfer
    - c. Landlord and tenant
    - d. Wills and intestacy
- H. Partnerships and corporations
  - 1. Partnership
    - a. Nature, formation and characteristics
    - b. Advantages and disadvantages
    - c. Kinds of partners
    - d. Rights, duties and liabilities of partners
  - 2. Corporations
    - a. Structure
    - b. Creation
    - c. Stocks and dividends
    - d. Dissolution

- I. Employer and employee
  - 1. Contracts of employment
  - 2. Protection of employees
  - 3. Government regulation
- J. Insurance
  - 1. Nature
  - 2. Types
    - a. Private
      - 1. Life and health
      - 2. Property and liability
    - b. Governmental
      - 1. Social security
      - 2. Workmen's compensation
      - 3. Unemployment compensation
      - 4. Industrial accident
- K. Motor vehicles
  - 1. Traffic regulations
  - 2. Automobile insurance

### III. TEACHING METHODS

- A. Use a combination of lecture, discussion and illustrative techniques.
- B. Read and discuss cases that will bring out points of law under consideration.
- C. When practical, make a planned trip to the state legislature and/or state supreme court while they are in session.
- D. When practical, visit a courtroom for the purpose of observing a trial of an actual case. As a follow-up, discuss in class the legal principles involved and evaluate the outcome of the case.
- E. Encourage students to bring to class specimen of negotiable instruments and discuss in class the practical everyday use of these instruments.
- F. Encourage students to bring contracts or other legal forms to class for examination.
- G. Direct the study of the usual route followed by a check from the time it is written to the time it is canceled to indicate the legal responsibilities of each holder.
- H. Invite resource people to talk to the class.
- I. Encourage students to make a scrapbook including legal forms and newspaper reports on cases involving legal principles studied.

## Business Law

- J. In teaching a business subject of this nature, one of the most successful plans has been for the teacher and members of the class to determine in beginning class meetings which areas in the table of contents are of most interest to them and have the most practical personal value. The various business and legal areas that are considered, then, will vary from school to school and even from class to class. In this way the course is tailored to the people involved. This approach is successful because of the following factors:
1. the students are interested because they have chosen subject matter
  2. students learn to appreciate and understand varying points of view through their classroom discussions. This aids their ability to analyze a problem, to think it through, to arrive at a well-supported decision
  3. there is a close correlation between the needs of the students and the problem discussed.
- K. Methods of presenting a particular subject
1. Together, students and teacher prepare a check list, probably on the chalkboard, of opinions, facts, attitudes, concepts, etc. concerning this subject.
  2. The class is divided into committees to gather information on the subject, starting with related material in the text, extending to other law texts, to library references, including encyclopedias, to news articles, and talking with parents and friends. Sometimes the students may prepare visual aids, if they seem appropriate.
  3. Panel members are chosen by the class to lead the discussion. With evidence and facts to support their statements, the discussion is "for real," and because all class members have acquired information on some facet of the subject, all can express their opinions.
  4. Finally, the first check list is re-examined. Students see what changes have taken place in their ideas and attitudes on the subject explored.
- L. Dramatization, or socio-drama, is an effective way to clarify difficult situations. These exercises may be lengthy or short. Short dramatizations can be done on a moment's notice to illustrate a case or principle.
- M. Oral and written reports are important in classwork.

## IV. EVALUATION, STANDARDS OF PERFORMANCE, TESTING AND GRADING

- A. The factual knowledge of the student can be measured by the administration of teacher-made tests and case problems.
- B. Tests prepared by textbook publishers may be used.
- C. Factors which should be considered in addition to tests in assigning final grades are attendance, work habits, participation in class activities, ability and willingness to follow instructions and behavior.

## V. TEXTBOOKS AND TEXTBOOK REFERENCES

### Basic Texts

Fisk and Snapp. *Applies Business Law*, South-Western.

Goodman. *Today's Business Law*. Pitman.

Schneider, Smith and Shitecraft. *Personal Business Law*. Gregg.

### References

Anderson. *Uniform Commercial Code Teaching Guide*. South-Western.

Black, H.C. *Law Dictionary*. West Publishing Co.

Cordell. *Dramatizing Business Law*. J. Weston Walch.

Cordell. *How to Teach Business Law*. J. Weston Walch.

A price list entitled *Laws of the United States*. Superintendent of Documents, Government Printing Office, Washington, D. C. 20402.

Representatives of business and industry provide free teaching materials.

Various Departments of the Federal Government, such as the Department of Labor, Social Security Board and the Federal Trade Commission distribute literature.

## VI. FILMS, FILMSTRIPS, CHARTS

### Films

"A Family Affair," 30 min., color, \$5 for 3 days' rental. Shows ordinary ways individuals can take part in making economic, political and legislative decisions on the national level. Shows how to evaluate legislative proposals. Chamber of Commerce of the U.S.

"A Law is Made," 28½ min., black and white, order No. 681242, purchase price \$175. Explains the steps a bill takes to become a law. McGraw-Hill Book Company, Text-Film Division.

"A Matter of Trust." 20 min., color, loan. Shows the position in which a man might find himself if he neglects his estate. Gives an overall picture of bank trust department operation. The Industrial National Bank of Providence.

"A Pre-Trial Conference," 25 min., rental, \$7.50. Shows the pre-trial conference of an exploding bottle case. (Timesaving advantages of such conferences not required in California legal procedure.) University of California Extension.

"After Prison What?" 12 min., \$50 purchase. Shows how ex-convicts encounters difficulty finding work because of prison record, despite the trade learned in penitentiary. By Canada's John Howard Society. National Film Board of Canada.

"After the Accident," 29 min., service fee, \$2.25. Law for the Layman Series. Discusses the law and the individual's responsibility to it following an automobile accident. Audio-Visual Instruction, Coliseum 131.

"Basic Court Procedures," 15 min., rental, \$3.50. Describes the functions of the courts, the operation of the law, the development of a case and the various roles of courtroom figures. Business Education Films.

"Civil Tax Law," 29 min., service fee, \$2.25. Law for the Layman Series. Tells what an individual should do when notified that his personal income tax return has been selected for audit. Shows a client and his lawyer as they meet with the Internal Revenue Service agent to discuss the client's return. Audio-Visual Instruction, Coliseum 131.

## Business Law

- "Common Law," 13 min., rental, \$4.00. Deals with common law as an important democratic institution and its relationship to our daily lives. Traces its historical background in the U.S. from Jamestown, Virginia, to the present day. Business Education Films.
- "County Magistrate," 20 min., rental, \$3.50. Deals with the Administration of justice on a local level. Shows a magistrate handling of a variety of criminal offenses. Business Education Films.
- "Court Procedure as it Relates to Witnesses," 28 min., service fee, \$2.25. This is the Law Series. Acquaints one with what to expect in courtroom procedure if called as a witness. Provides scenes of a pre-trial interview between attorney and witness and examination of a lay and an expert witness in a courtroom. Audio-Visual Instruction, Coliseum 131.
- "Defending the Unpopular Client," 30 min., black and white, rental, \$5. Interviews lawyer on the right or duty to represent unpopular clients. Gives valid reasons for refusing such a case, the necessity for ethical conduct in trial of such cases and the advantages and disadvantages of public defender system, etc. National Council on Legal Clinics.
- "Due Process and Equal Protection: Equal Protection of the Law," 30 min., black and white, write for price. Structure and Functions of the American Government Series. Discusses equality application of the law. Encyclopedia Britannica Films.
- "Due Process and Equal Protection: Procedural Due Process," 30 min., black and white, write for price. Structure and Functions of the American Government Series. Discusses the meaning of due process of the law. Encyclopedia Britannica Films.
- "Due Process and Equal Protection: Unreasonable Searches and Seizures," 30 min., black and white, write for price. Structure and Functions of the American Government Series. Discusses the search and seizure amendments to the Constitution. Encyclopedia Britannica Films.
- "Due Process of Law Denied," 29 min., write for price. Shows a frontier lynching in Old West--an innocent group of men rounded up by mob, falsely accused of cattle rustling, murder. Edited version of the Ox-Box Incident. AFL-CIO.
- "English Criminal Justice," 22 min., rental, \$3.50. Explains criminal court procedure as it is found in England. Shows the various types of courts and stresses that the defendant is innocent until proven guilty. Compares differences in American and English courts, such as: greater dignity, right of accused to make statements from the floor and the judge's advice to the defendant as to his rights and privileges. Reveals the procedure following "guilty" and "not guilty" verdicts. Business Education Films.
- "Equal Justice Under Law: The Judicial Process--Trial by Jury," 30 min., black and white, write for price. Structure and Functions of the American Government Series. Discusses the legal process of trial by jury. Encyclopedia Britannica Films.
- "How to Lose at Car Buying--Without Even Trying," 28½ min., service fee, \$2.25. Law for the Layman Series. Shows young couple purchasing a used car from a dealer. Discusses the mistakes made in the transaction. Gives procedures any buyer should follow in the purchase of a car. Audio-Visual Instruction, Coliseum 131.
- "Justice Depends on You," 29 min., service fee, \$1.50. This is the Law Series. Shows how justice is the concern of everybody. Gives the responsibility of the individual in informing about violations of the law, serving on jury duty and bringing the legal action against unlawful business practices. Audio-Visual Instruction, Coliseum 131.

- "Juvenile and the Law," 29 min., service fee, \$2.25. Law for the Laymen Series. Tells the policies and procedures followed when a young juvenile is apprehended and brought in for auto theft. Audio-Visual Instruction, Coliseum 131.
- "Landlord and Tenant," 29 min., service fee, \$2.25. Law for the Laymen Series. Outlines the rights and responsibilities of both the tenant and landlord in a lease agreement. Tells the difference in responsibilities between apartment-house and single-dwelling situations. Discusses insurance, subrogation and improvements. Audio-Visual Instruction, Coliseum 131.
- "Law and Social Controls," 10 min., rental, \$2.50. Explains three broad areas of social control: customs, moral codes, laws. Compares their effects at the local, state and national level. Business Education.
- "Law in Society," 30 min., write for price. Provides basic instruction in law, our legal system. Fifteen lessons are available. National Instructional Television Library.
- "Lawmaking Process," 28 min., service fee, \$2.25. Follows House Bill 1074 through the legislative process. Depicts the various steps from introduction of the bill to the final passage. Audio-Visual Instruction, Coliseum 131.
- "Man in the Middle: The State Legislator," 54 min., Parts I and II, black and white, order No. 672008, purchase price \$2.50. Explores the role of today's state lawmaker who is often caught in conflicting pressure from governors, party leaders, lobbyists and constituents. An NBC "White Paper" Production. McGraw-Hill Book Company, Text-Film Division.
- "Man on Trial," 30 min., rental, \$5. Gives an exciting and informative description of the workings of English justice. Tells an actual story of a habitual thief and follows him through his suspenseful trial and relates the method by which his fate is decided. Business Education Films.
- "Mess You Leave Behind," 29 min., service fee, \$2.25. Law for the Layman Series. Illustrates the problems created when both parents die and no wills are left. Dramatizes a situation of both parents killed in an auto accident, with a neighbor taking care of minor children. Audio-Visual Instruction, Coliseum 131.
- "Our Basic Civil Rights," 14 min., rental, \$3.50. Presents concepts of civil rights through a trial of a man charged with illegal distribution of handbills and his acquittal. Shows how civil rights defend the individual, their interrelation and defense. Business Education Films.
- "People and Things," 30 min., black and white, purchase or rental. Discusses the law's interest in the relation between a person and what he owns and the ways in which our system of law preserves this relationship. Describes the three essential ingredients of ownership: acquisition, use and enjoyment, and disposition. Points out why the law is necessary in ordering counseling and defining the many ways in which disposition should be carried out. The University of Michigan Television Center.
- "Practice Courtroom--Fell vs. Manlock," 7 min., rental, \$2.50. Reproduces the circumstances of a department store accident leading to a damage suit. The facts of the case are presented from the viewpoints of five witnesses. Business Education Films.
- "Preparing for the Trial," 30 min., rental, \$5.25. Action at Law Series. Describes a civil lawsuit based on automobile injury case. Shows how both sides prepare for trial. Describes final checks on witnesses, the conferences between the lawyers and their clients and the research which goes into decisions of courts in related cases. National Educational Television.

## Business Law

- "Problem Clinic," 12 min., rental, \$2.50. Portrays the kinds of free legal aid available to ensure that everyone has equal opportunity before the law. Shows various problems for which people receive advice and help through free legal clinics. Enacts the case of a young man facing a criminal charge. Business Education Films.
- "Procedure in the Traffic Court," 20 min., rental, \$5. Illustrates the formal opening of the courts, opening remarks by the judge, individual arraignments and pleas, rights of defendants and the judge's explanation of his decision and concluding procedure. Business Education Films.
- "Raw Material," 27 min., rental, \$6. Tells the work of the John Howard Society in rehabilitation of former prisoners through the story of Red Barker, ex-convict. International Films Bureau.
- "See a Lawyer," 29 min., service fee, \$2.25. Law for the Laymen Series. Discusses the layman's need for a lawyer, how to select a lawyer, the cost of legal advice and the preventative measures against later problems in many transactions. Audio-Visual Instruction, Coliseum 131.
- "Taking the Mystery Out of Wills," 30 min., black and white, rental or purchase. The University of Michigan Television Center.
- "The Best Laid Plans," 30 min., black and white, purchase or rental. Discusses several of the legal problems and pitfalls which affect the disposition of property at the time of death. Discusses estate planning, wills and several methods of disposition of property, pointing out the availability of the law as a position consulting force for the laymen. The University of Michigan Television Center.
- "The Criminal and Punishment," 30 min., rental, \$5.25. Discusses the concept of punishment of criminal behavior. Gives the evolution of rehabilitation with emphasis upon the criminal rather than the crime. Interviews five inmates of San Quentin Prison. National Education Television.
- "The Justice of Law," 29 min., black and white, rental, \$5.25. The Great Ideas Series. Defines justice of law. Relates natural law to just and unjust law. Discusses equality of justice and how man-made laws have been evolving toward natural law. National Educational Television.
- "The Lawyer's Place in Our Society," 48 min., black and white, rental, \$5. Discusses the role of the lawyer as a wise counselor to his clients, what is meant by practicing law "in the grand manner," and the practice of criminal law. National Council on Legal Clinics.
- "The Making of Law," 29 min., rental, \$5.25. The Great Ideas Series. Illustrates need for law and the kinds of law men provide over and above natural or divine law. Compares various kinds of law with the enforcement necessary to make them binding. National Educational Television.
- "The Nature of Law," 29 min., rental, \$5.25. The Great Ideas Series. Discusses the differences in use of the word law in natural science, art, politics and conduct. Gives various concepts of law. Shows that criminal law makes up only small portion of laws of daily life. Provides opposing views on what constitutes law. National Educational Television.
- "The Rise of Organized Labor," 18 min., black and white, order No. 671311, purchase price, \$125. Explains the economic conditions that forced workers to join unions, traces the growth of organized labor and discusses what the past and present problems and responsibilities of unions are in our economic system. McGraw-Hill Book Company, Test-Film Division.



- "The Supreme Court," 10 min., rental, \$2.50. Explains the structure of the Supreme Court, how it works, how a case gets to and through the court and the authority of a Supreme Court decision. Points out the importance of the Court in preserving political institutions and describes its effects upon national life.
- "The Trial: The Case for the Plaintiff," 30 min., rental, \$5.25. Action at Law Series. Continues the documentary drama of the civil lawsuit based on automobile injury case. Includes: beginning of trial, how prospective jurors are chosen and questioned to determine possible bias, how the jury is finally selected and sworn in, and lawyers' opening statements to the jury. Concludes with the direct, cross-examinations of all witnesses in case for plaintiff. National Educational Television.
- "The Witnesses to the Accident," 30 min., rental, \$5.25. Action at Law Series. Continues civil lawsuit based on automobile injury case. Dramatizes defendant's first meeting with his lawyer, the filing of an answer to the plaintiff, the defendant taking depositions of the principal parties to the dispute and how the witnesses to the accident are questioned and their statements are recorded. National Educational Television.
- "Think First," 20 min., rental, \$5. Describes the career of two young women shoplifters as they are recruited by gang, captured and convicted. Films, Inc.
- "Traffic Court," 8 min., rental, \$2.50. Stresses the importance of traffic courts in dealing with the public. Explains the characteristics of good court administration and procedures.
- "Trial by Jury," 30 min., rental, \$5. Depicts the highlights in the trial of an ordinary automobile accident damage suit, beginning with the accident, the filing of the complaint, serving of the summons, process of selecting and impaneling the jury and the rendering and reception of the verdict. Gives special emphasis to court organization and the role of the jury. Recommended for law, civics and social studies classes. Will help develop an appreciation of the complex system of justice through trial juries. Business Education Films.
- "Trial--The Case for the Defendant," 30 min., rental, \$5. Dramatizes a defendant's day in court. Presents direct and cross examination of all witnesses in the case for the defendant. Shows the jury being instructed on the law by the judge and the final arguments by the lawyers. Concludes with the deliberation of the jury and its verdict. Business Education Films.
- "Understanding the Law," 11 min., rental, \$2.50. Explains the right of the individuals to be protected from the law and by the law. Illustrates step-by-step functions in the due process of law, with a series of dramatic sequences in actual courtrooms; and features a criminal trial by jury. Business Education Films.
- "Victim or Witness?" 5 min., color, purchase. Designed for bank tellers and businesses where employees handle cash. Describes how employees of financial institutions can aid the FBI in apprehending robbers. Frank Willard Productions.
- "Village Notary," 10 min., rental, \$2.50. A satire on a notary unravelling family legal complications. Shows the involved legalities that arise after a man's death, when no will is left, and the solution by the notary. Business Education Films.
- "What is a Contract?" 10 min. Describes oral and written contracts and shows how a contract must have mutual assent, competent parties, a legal bargain and consideration. University of Kentucky Film Library, No. 6309, rental \$1.50. Business Education Films, rental \$2.50.

## Business Law

"Why We Respect the Law," 14 min., service fee, \$4.50. Illustrates the importance and reasons for law, importance of right attitudes toward all law and consequences and causes of disrespect for law. Audio-Visual Instruction, Coliseum 131.

"Why We Respect the Law," 14 min., rental, \$3.50. Shows four high school students accused of stealing lumber from a construction company to build a backstop for their baseball diamond. Shows a lawyer helping the boys to understand how the law guarantees freedom and protection for all. Concludes with the settlement of the account with the company. Business Education Films.

"With Benefit of Counsel," 15 min., color, \$6 rental to schools, \$12 rental to legal organizations. Shows the importance of the legal profession in maintaining the basic foundations of democracy. Portrays the education of a lawyer, his professional ethics and skills, his standing in the community and the need for his services. Business Education Films.

"You and the Bank Robber," 19 min., color, purchase price, \$150. Designed for bank personnel. Instructs bank personnel about robbery prevention measures; what to do during and after a robbery; how an informed and observant employee can be a deterrent to robbery. Highway Safety Foundation.

"Your Government--The Supreme Court," 10 min., black and white, order No. 658029, purchase price, \$60. Gives the history of the Supreme Court. Explains how the Court works, how a case gets to and through it, the extent of its authority, its role in preserving our political institutions and its effect upon the national life. McGraw-Hill Book Company, Text-Film Division.

## Filmstrips

"Equality Before the Law," color, purchase, \$4.50, rental, \$1. Illustrates the ordinary citizens right of equal treatment, protection of person and property, writ of habeas corpus, fair trial by jury. Curriculum Materials Corporation.

"Greedy Hands," 13 min., color, sound, purchase or rental. Explains to employees how they can cope with shoplifting. Shows that courteous attention is shoplifting prevention and demonstrates differences between the amateur and professional shoplifter. Harris-Tuchman Sales Aids Company.

"How a Bill Becomes Law," order No. 40020--Your Federal Government Series, purchase price, \$6.75. McGraw-Hill Book Company, Text-Film Division.

"How Our Laws are Made," order no. 166000--Civics Series, purchase price, \$6.75. McGraw-Hill book Company, Text-Film Division.

## Charts

Business Law Charts (Set No. L-1, price, \$16, four 19" x 25" charts). Illustrate elements of a contract, bailments, debtor and creditor and employee-employer relationships. Teaching Aids Inc.

Quick Charts. Business Law 1 and Business Law 2, two 8½ x 11 plastic loose-leaf charts for learning and review, \$1 each, 70 cents each for three or more. Data-Guide, Inc.

**Addresses of Audiovisual Producers**

- AFL-CIO, Department of Education, 815-16th Street, N.S., Washington, D.C. 20006
- The American Assembly, Columbia University, Room 806, Uris Hall, New York, N.Y. 10027
- Audio Visual Instruction, Coliseum 131, Corvallis, Oregon 97331
- Business Education Films, 5113-16th Avenue, Brooklyn, N.Y. 11204
- Chamber of Commerce of the United States, Audio-Visual Service Dept., 1615 H Street, N.W., Washington, D. C. 20006
- Curriculum Materials Corporation, 1319 Vine Street, Philadelphia, Pa.
- Data-Guide, Inc., 154-01 Barclay Avenue, Flushing, N.Y. 11355
- Encyclopedia Britannica Films, 1150 Wilmette Avenue, Wilmette, Ill 60091
- Films, Inc., 5625 Hollywood Boulevard, Hollywood, Calif. 90028
- Frank Willard Productions, 1842 Briarwood Road, N.E., Atlanta, Ga. 30319
- Harris-Tuchman Sales Aids Co., 751 North Highland Avenue, Hollywood, Calif. 90028
- Highway Safety Foundation, Inc., Box 1563, Mansfield, Ohio 44907
- The Industrial National Bank, Providence, R.I. 02901
- International Film Bureau, 332 South Michigan Avenue, Chicago, Ill. 60604, Attention: Wesley Greene, President
- McGraw-Hill Book Company, Text-Film Division, 327 West 41st Street, New York, N.Y. 10036
- National Council on Legal Clinics, 1155 East 50th Street, Chicago, Ill. 60637
- National Education Television, (NET) Film Service, Audio-Visual Center, Indiana University, Bloomington, Indiana 47401
- National Film Board of Canada, 680 Fifth Avenue, Suite 819, Canada House, New York, N.Y. 10010, Attention: Office Manager
- National Instructional Television Library, 10 Columbus Circle, New York, N.Y. 10019.
- Teaching Aids Incorporated, Box 3527, Long Beach, Calif. 90803
- University of California Extension, Educational Films, Sales Department, Berkely, Calif. 94704.
- The University of Michigan Television Center, 310 Maynard Street, Ann Arbor, Michigan 48108, Attention: Garnet R. Garrison.
- University of Southern California, Department of Cinema, Film Distribution Division, University Park, Los Angeles, Calif. 90007, Attention: Glen McMurray.

## VII. EQUIPMENT AND LAYOUT

### A. Equipment

- Overhead and opaque projectors
- Screen
- Desks or tables
- Chalkboard
- Bulletin board
- Projectors for films and filmstrips

### B. Layout

It is suggested that any general business room be used. The tables and/or desks may be arranged in a circle or semi-circle to promote your discussions by furthering eye contact. It is a more relaxed, informal arrangement.

## BUSINESS MACHINES

One semester or one year

Grade 11 or 12

Vocational

The business machines course is designed to prepare students to operate those types of business machines which they will most often be required to use on the job. This course includes instruction on the following types of equipment: adding and calculating machines, duplication machines and transcribing machines. This could be a separate course offered for one semester or one year as time and equipment permit; or it could be integrated into secretarial or clerical office procedures.

### TABLE OF CONTENTS FOR CALCULATING MACHINES

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**Business Machines**  
**Calculating**

**I. OBJECTIVES\***

The student will:

- A. read and follow directions
- B. use the proper fingering techniques in machine operation
- C. identify the various types of machines presented according to function and purpose
- D. complete the fundamental operations of arithmetic and apply them to each of the machines presented
- E. solve the kinds of problems related to each machine used which might be encountered in a business occupation
- F. recognize and identify a variety of common business forms
- G. correct errors
- H. handle working papers efficiently
- I. demonstrate proper care and handling of equipment.

**II. UNITS--TOPICAL OUTLINE**

- A. Adding Machines
  - 1. General directions applicable to both ten-key and full-keyboard machines
  - 2. Techniques in operating machine
    - a. Position of machine and operator
    - b. Location of materials
  - 3. Techniques and abilities to be developed on the 10-key machines
    - a. Touch systems
    - b. Addition, subtraction, multiplication, division
    - c. Total and subtotal keys
    - d. Repeat and non-add keys
    - e. Proving work
    - f. Proving work
    - g. Credit balances
    - h. Invoice extensions and totals
    - i. Payroll computation
  - 4. Techniques and abilities to be developed on the full-keyboard machines
    - a. Fingering
    - b. Addition, subtraction, multiplication, division
    - c. Total and subtotal key

\*The minimum acceptable standards should be determined by the individual teacher. Suggested standards are given in Chapter IV of this section.

- d. Proving work
- e. Corrections
- f. Credit balances
- g. Computing discount and net amount
- h. Chain discount

B. Calculating Machines

1. Techniques and abilities to be developed on the printing calculators
  - a. Touch control
  - b. Addition, subtraction, multiplication, division
  - c. Corrections
  - d. Credit balances
  - e. Constants
  - f. Percentages
  - g. Interest
  - h. Computing discount and net amount
  - i. Chain discount
  - j. Payroll computation
  - k. Percent of increase and decrease
2. Techniques and abilities to be developed on the rotary and key-driven calculators
  - a. Fingering
  - b. Addition, subtraction, multiplication, division
  - c. Corrections
  - d. Repeat key
  - e. Constants
  - f. Percentage
  - g. Computing discount and net amount
  - h. Chain discount
3. Techniques and abilities to be developed on the electronic calculators
  - a. Touch system
  - b. Addition, subtraction, multiplication, division
  - c. Corrections
  - d. Repeat key
  - e. Constants
  - f. Percentage
  - g. Computing discount and net amount
  - h. Chain discount
  - i. Programming

### III. TEACHING METHODS

- A. Teacher demonstration may be used.
- B. *The Battery Method* provides instruction on one machine for the entire class.

Under the battery plan, each student will have a machine available to him while instructions are being given. Obviously this method will require as many machines of each type as there are students in the class. This plan is best adapted for use in schools with large business machines offerings.

## Business Machines

### Calculating

This plan can be used effectively, however, for units in typing, data processing and general discussion of any piece of equipment.

- C. *The Rotation Plan*, which is organized around individual or small-group instruction, permits students in one classroom to work on different machines during the same class period. See example.

This plan is easily adapted to either a large or small school. Its special advantage lies in the fact that it requires a minimum of equipment.

To facilitate the beginning of the rotation schedule, the operations of all machines should be demonstrated to the students at the beginning of the schedule year, preferably while other students are working in a battery unit. Demonstrations of these machines are more effective when done with small groups of students. A small group is requested to leave the regular work in the battery unit in order to watch the demonstrations. *Machine demonstrations must be repeated when students later begin work on the various machines in the rotation schedule.* After students have learned to operate a machine, it may be helpful to have each student assist the new learner who is scheduled to being work on the machine.

- D. *The Integrated Method* involves setting up a model office with several departments.

This method offers the advantage of organizing all instruction into job situations, and the students have opportunities to meet actual job standards.

The integrated method can be used in a small school, but a school with a large amount of space and equipment can more closely simulate a realistic office situation.

- E. Combinations of the battery, rotation and integrated plans may be used successfully when such combinations are carefully designed.
- F. Because activities of a business machine class are on an individual basis, the classroom should assume the atmosphere of an office.
- G. Although much of the classroom work is done on an individual basis for the student, the instructor should be cautioned about the importance of continually observing student work habits and assisting with student questions and problems.
- H. Assignment sheets with instructions are prepared for each machine.
- I. Production timings should be given on two-, three- and four-column tabulated reports.
- J. Arrange with machine distributors for a display and demonstration of makes of machines not available in the classroom.
- K. Use of EDL equipment. See Chapter VII of this section.



## ROTATION PLAN

Number of Pupils-- divided into groups of convenient size May NOT be equal.	Period of Time Spent in Rotation Plan The beginning and ending dates for each time period should be listed. and these times do NOT need to be equal.						
	1st	2nd	3rd	4th	5th	6th	7th
Group 1 (name of pupils)	A	B	C	D	E	F	G
Group 2	G	A	B	C	D	E	F
Group 3	F	G	A	B	C	D	E
Group 4	E	F	G	A	B	C	D
Group 5	D	E	F	G	A	B	C
Group 6	C	D	E	F	G	A	B
Group 7	B	C	D	E	F	G	A

A=Ten-key  
B=Printing Calculator  
C=Electronic Calculator

D=Rotary Calculator  
E=Full-keyboard  
F=Key-driven

G=Bookkeeping-Posting Machine

#### IV. EVALUATION, STANDARDS OF PERFORMANCE, TESTING AND GRADING

A. Evaluation: Probably the most appropriate criteria is given by Lee and Ruegg in the *American Business Education Yearbook, 1960*, where they state that the following questions should be answered:

1. Can the student operate the machine taught in terms of the standards of quality and quantity established for the class?
2. Does the student give evidence of the ability to apply his training in a job situation?
3. Has the student developed mathematical understanding that will enable him to continue to develop on the job, or has he merely grasped the ability to perform set mechanical operations?
4. Does the student have comprehension of written problems beyond the mere computation of answers to listed numerical data?
5. Does the student understand the full potential of each machine with which he is working?
6. Does the student demonstrate in class those personal characteristics that will make him a satisfactory employee?

B. Testing: Lee and Ruegg also list the following items that should be considered by teachers in preparing tests:

1. performance tests on the fundamental operations of the machine on a timed basis, with a weighted grade for accuracy and speed
2. questions that would measure the student's ability to handle office forms, making necessary machine computations
3. short-answer questions on the parts and functions of the machine
4. problem situations, the answers to which would be worked by the student from his overall understanding of the machine
5. rating scale of desirable personal habits.

C. Grading: A combination of two or more methods should provide an effective grading system

1. **Accuracy**
  - a. Number of correct answers
  - b. Number of correct answers as a percent of the number of problems completed
  - c. Number of correct answers as a percent of the problems assigned

#### SUGGESTED ACCURACY SCALE

100%	A
92% - 99%	B
88% - 91%	C
75% - 87%	D

2. **Time**
  - a. Number of problems completed
  - b. Students ranked on the basis of time as they complete assignment
  - c. Time limit set by the instructor, **based on previous experience** with similar students and machines.
  - d. Predetermined grading scale **based on previous experience**

#### SUGGESTED SPEED SCALE

96% - 100%	A
90% - 95%	B
82% - 89%	C
75% - 81%	D

Note: In grading according to time, the instructor should have taught this class for at least two semesters before determining the positive length of the time taken and the grading scale. After the instructor has had time to develop an appropriate grading scale, the ultimate grade will be weighted in favor of accuracy rather than speed or time.

## V. TEXTBOOKS AND TEXTBOOK REFERENCES

Note: Listed below are books which may be used as textbooks or textbook references in teaching this course. Most books have been classified according to the type of problems used and the machines presented.

Agnew, Peter L. *Machine Office Practice*. South-Western Publishing Company. Practice set consisting of 40 jobs and using actual business forms.

Agnew and Pasewark. *Full-Keyboard Adding Machine Course*. South-Western Publishing Company. Covers several brands of manual and electric full-keyboard adding machines. Uses extensive arithmetic exercises and business application problems, but no working papers and very few business forms.

Agnew and Pasewark. *Key-Driven Calculator Course*. Fourth Edition, South-Western Publishing Company, 1962. Covers Burroughs, Comptometer and Plus Calculators. Uses extensive arithmetic exercises, business and application problems. etc., but no working papers and very few business forms.

Agnew and Pasewark. *Rotary Calculator Course*. Fourth Edition, South-Western Publishing Company, 1962. Covers Friden, Marchant and Monroe rotary calculators; manual, electric, semi-automatic, and fully automatic. Uses extensive arithmetic exercises, business application problems, etc., but no working papers and very few business forms.

Agnes and Pasewark. *Ten-Key Adding-Listing Machine and Printing Calculator Course*. Third Edition. South-Western Publishing Company, 1963. Covers Standard Manual, Standard Electric, Automatic Multiplier and Printing Calculators. Uses extensive arithmetic exercises and business application problems, but no working papers and very few business forms.

Berg, Gary. *Business Problems and Applications with Electronic Calculators*. Berg Publishing Company, 1969. Covers electronic calculators of various brands. Uses flowcharting extensively. Problems are derived from business applications, but do not use business forms.

## Business Machines

### Calculating

Cornelia and others. *Office Machines Course*. Fourth Edition, South-Western Publishing Company, 1971. Covers full-keyboard, ten-key, rotary calculator, key-driven calculator, printing calculator and electronic calculator. Uses simple arithmetic problems and repetition only.

Fasnacht and others. *How to Use Business Machines*. Third Edition. Greg Division/McGraw-Hill Book Company, 1969.

Gibson, E. Dana. *Adding Machines Systems*. William C. Brown Publishing Company.

Giordano, Al. *Basic Business Machine Calculation: A Complete Course*. Prentice-Hall, Inc., 1970. Covers Ten-key, printing calculator, electronic calculator, full-keyboard, rotary calculator and key-driven calculator.

Kallaus and Clark. *College Business Machines*. Gregg Division/McGraw-Hill Book Company, 1970. Covers ten-key, full-keyboard, printing calculator, rotary calculator and key-driven calculator. Uses flowcharting and business application problems.

Locke and Dehr. *Office Calculating and Adding Machines*. Second Edition, John Wiley and Sons, Inc., 1966. Covers rotary calculator, key-driven calculator, printing calculator, ten-key and full-keyboard. Uses simple arithmetic problems mainly; includes some office applications but no business forms.

Locke and Dehr. *Office Calculating and Adding Machines*. Third Edition, John Wiley and Sons, Inc., 1969.

McCready, Richard R., *Solving Business Problems with Calculators*. Third Edition, Wadsworth Publishing Company, 1969. Covers printing calculator, key-driven calculator, electronic calculator, ten-key and full-keyboard. Uses business application problems.

Pacto and Johnson. *Comprehensive Business Machines Course*. Revised Edition, Pitman Publishing Corporation, 1968. Covers full-keyboard, ten-key rotary calculator and key-driven calculator. Uses business application problems.

Romey and Anderson. *A Laboratory Manual in Business Machines*. William C. Brown Publishing Company, 1970. Covers ten-key, full-keyboard, printing calculator, electronic machines and dictating-transcribing machines. Uses simple arithmetic problems mainly, but does include some practical office applications and forms.

Walker and others. *How to Use Adding and Calculating Machines*. Third Edition, Gregg Division/McGraw-Hill Book Company, 1967. Covers full-keyboard, ten-key, printing calculator, rotary calculator, and key-driven calculator.

## VI. BOOKLETS, PERIODICALS, JOURNALS, MAGAZINES AND MONOGRAPHS

*Office Machines Used in Business Today, An Annotated Bibliography*. Fred S. Cook. Wayne State University, 1965.

*The Secret of Speed in Adding Machine Operation*. Victor Adding Machine Company.

*The Business Education World*

*The Balance Sheet*

*The Journal of Business Education*

*The National business Education Quarterly*

*AMS Management Bulletins*

*The Office*

*Business Automation*

*Business Education Forms*

Instruction booklets and training courses published by the various machine manufacturers and available through local distributors.

## **VII. FILMS, FILMSTRIPS, TAPES, RECORDS, TRANSPARENCIES, OPAQUE PROJECTIONS, CHARTS AND MODELS**

*Ten-Key Touch Training Course.* a 25-filmstrip course used with EDL Controlled Reader. The course is designed for use in training touch operation on all electric ten-key machines and is also appropriate for training operations of other adding and calculating machines.

Wall charts and demonstration posters of various machines published by machine manufacturers and available locally through the distributors of various companies.

## **VIII. EQUIPMENT AND SUPPLIES and**

### **IX. LAYOUT AND FACILITIES**

- A. The room
  - 1. Sound-deadening treatment of ceiling, walls and floor
  - 2. Proper ventilation
  - 3. Proper lighting
  - 4. Lockable storage for textbooks, tapes, extra machines, ribbons, etc.
  - 5. PA system loud speaker used throughout the building
  - 6. At least one electrical outlet for every machine being used or every student work station (see below)
  - 7. Standard classroom supplies
    - a. Pencil sharpener
    - b. Wastebaskets
    - c. Projection screen
- B. The student work station: the size of the room and the enrollments of the classes will determine how many student work stations can be incorporated into the classroom. Once that number has been selected, the following equipment will need to be obtained for each station:

## Business Machines

### Calculating

1. student office machines desk with rack for books
2. adjustable, swivel, castered secretarial posture chair
3. one calculating machine equipped with tape, electrical cord and a power adapter
4. electrical outlet in direct access to each machine

### C. The instructor's work station

1. Standard office desk with at least six drawers
2. Additional supplies
  - a. Paper clips
  - b. Stapler, staples, staple remover
  - c. Legal-sized manilla folders (each student should be assigned a folder which will be kept in the instructor's desk and will contain all of the student's corrected papers); one folder for each student for the entire year
  - d. Answer keys, tests, texts and appropriate practice sets
  - e. Tapes for printing machines
  - f. Scissors
  - g. Rubber bands
  - h. Facial tissue
  - i. Cellophane and masking tape with dispensers
  - j. Felt-tipped markers
  - k. In and out trays where students will place completed projects for grading
3. Office administrator's chair or standard adjustable, swivel secretarial posture chair with casters
4. Side chair for student consultations

## BUSINESS MACHINES

Duplicating-Transcribing Machine

Grade 11 or 12

Vocational

The business machines course is designed to prepare students to operate those types of business machines which they will most often be required to use on the job. This course includes instruction on the following types of equipment: adding and calculating machines, duplicating machines and transcribing machines. This could be a separate course offered for one semester or one year as time and equipment permit; or it could be integrated into secretarial or clerical office procedures.

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**Business Machines**  
**Duplicating-Transcribing**

## **I. OBJECTIVES**

The student will:

- A. become acquainted with various types of machines and related materials
- B. develop correct techniques and habits to provide for further training and practice on machines
- C. develop skill in the use of a variety of office machines and related equipment
- D. follow written and oral directions
- E. perform in a businesslike manner
- F. demonstrate proper care and handling of equipment.

## **II. UNITS--TOPICAL OUTLINE**

The number of units in this course will be determined by (1) the equipment available in the system, and (2) the time allotted by those who decide the department curriculum and course content.

- A. Introduction to duplicating
  - 1. Overview of many processes, beginning with carbon paper; compare costs, uses, durability
  - 2. Discussion of kinds of paper and other supplies and equipment, suited to particular process
  - 3. Instruction on handling supplies, caring for machines, evaluation of end product
- B. Liquid duplicating
  - 1. Principles of process discussed
  - 2. Prepare model copy of typewritten letter or report
  - 3. Prepare master; proofread; make corrections as necessary
  - 4. Prepare model which includes writing and drawing
  - 5. Select paper; prepare it for machine ("fan," "jog." etc.)
  - 6. Prepare machine
    - a. Fluid control
    - b. Pressure control
    - c. Counter
    - d. Centering adjustments

\*The minimum acceptable standards should be determined by the individual teacher. Suggested standards are given in Chapter IV if this section.



7. Run trial copies; check margins, placement color; complete
  8. Care for machine and work area
    - a. Clean
    - b. Adjust as needed, returning adjustments to normal
    - c. Put away supplies
- C. Stencil duplicating
1. Principles of stencilization explained; study stencils, including variety of rulings, numbering, etc.
  2. Prepare typewriter for stenciling
  3. Prepare stencil with typing place
  4. Prepare stencil using tissue cushion
  5. Practice using scope, styling, lettering guides, shading plates; lettering drawing, ruling, writing
  6. Practice justifying margins, typing for postals, plan for printed program
  7. Demonstration of machine preparation
    - a. Affix stencil on cylinder, leaving backing sheet until not needed to smooth out wrinkles, check inking, etc.
    - b. Load paper and adjust
    - c. Ink machine as directed
    - d. Position controls; trial run
    - e. Check, set counter and run job
    - f. Remove, clean, file or store stencil
    - g. Leave working area clean and in order
  8. Acquaintance with electronic stenciling
- D. Photocopy duplicating
1. Study and discuss the different methods and kinds of photocopy duplicating machines, comparing:
    - a. principles of the process
    - b. time required to make copies
    - c. use of product
    - d. durability of product
    - e. cost of product.
  2. On Thermo-Fax Secretary, for example, student will learn type of materials and machine settings needed to produce:
    - a. single facsimile copy
    - b. master copy, for use on liquid duplicator
    - c. transparency, for use on overhead projector.

**Business Machines**  
**Duplicating-Transcribing**

E. Offset duplicating

Note: Because of the relatively complicated nature of this process, the learner should read and follow directions as outlined in course books and technique pamphlets issued by the machine companies. Following would be a general topical outline, as presented by A. B. Dick for their models:

1. learn fundamentals and principles of off-set duplicating similarities and differences compared to liquid, stencil, and photocopy
2. learn to prepare a direct image (paper) master
3. run copy on machine
  - a. study parts, setting, controls
  - b. select paper and make feed table adjustments
  - c. adjust feed rolls
  - d. set receiving tray
  - e. run required number of copies
  - f. put working area in order
4. learn to make additions, corrections and deletions and to rerun masters
5. learn to draw, rule and letter on a direct-image master
6. learn to make art work for school newspaper, announcements, posters, etc.

F. Transcribing equipment

Note: Machine transcription requires the use of an instruction book for the particular machine being used, and a prepared course of study suited to this machine. The following suggestions supplement such instruction:

1. immediately previous to the first use of the transcribing equipment, when students are being asked to type from sound, rather than sight, it is helpful to have students
  - a. compose short letters on a given subject
  - b. type letters in response to oral directions and dictation of instructor
2. preview material is usually given in the transcription text for each disc or belt. This can be used with the entire class at their typewriters, either in duplicated form, or dictated by the instructor
3. if a choice is possible, members of the class who rank best in typing should be first at transcribing machines. Their success gives confidence to others
4. students should repeat the first easy disc, belt or tape until it seems easy to them, and they are able to type almost constantly while listening
5. following this preliminary practice, change materials often, for students to become accustomed to different voices and styles of dictation
6. after proficiency in transcription is reached, then properly arranged, mailable letters of acceptable manuscripts will be required.

Students should be reminded to keep volume as low as feasible, with high pitch avoided, to prevent headaches which are sometimes a complaint.

### III. TEACHING METHODS

Note: The business machines course represents a "doing" situation, and this should be the direction of the planning. Success in any course depends on the development of meaningful, relevant assignments that the student will see as worthwhile jobs that can be successfully completed. Relevant assignments provide a strong motivational force that should never be forgotten in the overall and day-to-day planning.

The office machines teacher is specifically concerned with the development of skill in the operation of a few or several office machines, depending on size of school and length of the course. He may have as many as 10 or 15 activities in progress at the same time. He must, therefore, find a simple, effective, interesting way to give instruction simultaneously to students engaged in varied activities.

Several methods, used in various combinations, have been useful.

#### A. Instruction sheets (or job descriptions)

1. directions more likely to be complete and understandable, if planned and written before class
2. thorough analysis of operation is possible
3. instructions available to student for constant reference
4. can give supplementary information which may be meaningful to student only after he has developed a degree of skill
5. use of these sheets releases teacher's time for giving individual assistance to students
6. tends to place responsibility for skill development on student
7. the preceding advantages are true only on the assumption that the instruction sheets are well-prepared

#### B. Demonstration by teacher

During these periods of instruction, the instructor actually performs the operation of a machine or does some kind of job. The success depends largely on the adequacy of the teacher's preparation and the teacher's skill in this particular area. The teacher should check the following points in making preparation for the demonstration.

1. Is equipment situated so students can see demonstration well?
2. Is equipment in good operating condition?
3. Are supplies ready for immediate use? (This includes tools, etc.)
4. Are there any visual aids which might supplement the demonstration?
5. Is review of the operation of the machine advisable for the teacher?

## Business Machines

### Duplicating-Transcribing

#### C. Demonstration by visitor

The teacher may arrange a time for a company representative to demonstrate a particular machine in the department. Advantages of such a presentation are

1. students may pay closer attention to the outsider than to the teacher to whom they are accustomed
2. students may consider information given by an outsider to be more important or more up-to-date
3. students may have greater respect for the teacher's knowledge or opinions when they note they are in agreement with those of outsiders.

#### D. Demonstration by other students

In the rotation plan, after some students have performed on a particular machine, they may be the best demonstrators, for their knowledge and skill is recent and fresh, and students have respect for members of their peer group.

#### E. Class Lecture

In introducing a unit of instruction, the teacher may determine that a certain package of information and understanding must first be presented, such as a general definition of duplicating processes, and a comparison of those processes. There are times when this "lecture" may be presented by a student.

#### F. Group Discussion

This method of instruction will be at a minimum in a skill course, but it may be used at times, as in a comparison of processes, of materials, of letter styles.

#### G. Field Trips

This activity should not take too much time in a skill course, but it provides an opportunity for students to become acquainted with machines not available in the business department, their functions, their **appearance**, their adaptability. Office procedures and room layout can also be observed. In addition, field trips give an opportunity to acquaint the community with the work and interests of the business education department of the school.

#### H. Service jobs for the school and community

In the area of duplicating, there will be many opportunities for the members of the class to complete specific jobs, such as preparing the school newspaper, completing programs for athletic or dramatic programs, running off tests for members of the faculty or duplicating bulletins for the office. There is a real danger that these activities can take an inordinate amount of time for some students unless some type of schedule or policy is agreed upon among members of the staff and administration. Realistic practice is good; but there are many types of work to practice, and the student must have time for all of them.

I. Rotation Plan

It is obvious that many activities of the business machines class will be a part of the usual rotation plan, with a student operating one machine a given length of time, then shifting to another. Job sheets are an integral part of this plan. At other times, however, the battery plan will be used, where all students are working on the same machine or project at the same time. Pretraining for transcribing machines is an example of the battery plan.

J. Student notebook or multi-folder

This can include the following items that will prove to be useful to the student during the progress of the course and after the course is completed:

1. assignment or job sheets
2. notes based on teacher lectures and student reports
3. samples of their duplicated work
4. adding and calculating machine problems, answer sheets, etc.
5. advertising brochures from machine companies, which give an overview of many kinds and makes of office machines
6. cartoons that illustrate material being covered.

K. Be creative! You, the teacher, will find other ideas useful and interesting.

CHECK LIST FOR FLUID DUPLICATION  
(sample)

1. Plan layout--get approval
2. Prepare master set
  - a. Clean type, ribbon on black
  - b. Remove thin sheet, insert bottom end first, to correct more easily
  - c. Type slower, with even touch
  - d. Corrections: Long errors, correction tape; short errors, razor blade or knife; use scotch tape, white pencil, correction fluid to cover up. (Practice all)
  - e. Proofread carefully
3. Clean typewriter, desk and hands with hand cleaner as needed
4. Run master copy
  - a. Tear carbon off, fold and throw away
  - b. Install copy, carbon side up
  - c. Put fluid tank in place, after filling if necessary
  - d. Turn pressure to 2 or 3 (higher if colored or used before)
  - e. Install paper (Caution: check the kind of paper and correct side)
  - f. Make trial run. Errors? Smears? Moist enough? Pressure?
  - g. Make all corrections and center adjustments at one time (Every time the copy gets wet, it gets dimmer)
5. Decide number of copies; set counter at zero
6. Before leaving machine
  - a. Turn fluid off
  - b. Turn pressure to zero
  - c. Replace paper in package--the correct package!
  - d. Remove master and staple sheet of paper next to carbon side
  - e. Clean duplicator with fluid and paper towel
  - f. Clean cabinets, desk and *yourself*
7. Straighten copies, cut, fold or staple if necessary; think; ask
8. Fasten best way and place stack on desk with master on bottom of stack

(This check list, with portions borrowed from the machine manufacturer's instruction book, can serve as both job outline and evaluation sheet.)

**STUDENT CHECK LIST FOR LIQUID DUPLICATING SYSTEMS**  
(sample)

1. I can type good masters, because I have:
  - a. Pre-arranged copy to go on the master . . . . .
  - b. Used a firm, even touch in typing master . . . . .
  - c. Made corrections that can't be noticed when copy is run . . . . .
  - d. Proofread copy . . . . .
  
2. I can use scotch tape
  - a. To fasten copy together correctly . . . . .
  - b. To make corrections . . . . .
  - c. To cover up spots . . . . .
  - d. To block out undesired material . . . . .
  
3. I can run off copies on various sizes of paper, and make other adjustments, because I can:
  - a. Adjust side-gauge brackets in feed tray . . . . .
  - b. Adjust paper feed mechanism . . . . .
  - c. Allow for horizontal and vertical placement . . . . .
  - d. Adjust the pressure and fluid mechanism . . . . .
  - e. Operate the trip lever . . . . .
  
4. I can run clean copy because I can:
  - a. Clean the front rollers of the machine . . . . .
  - b. Clean the drum . . . . .
  
5. I can fill liquid reservoir . . . . .
  
6. I know how to leave the machine (pressure and fluid off) . . . . .
  
7. I can prepare masters for filing . . . . .

<b>Rating:</b>	
<b>S</b>	<b>Satisfactory</b>
<b>N</b>	<b>Need Improvement</b>
<b>U</b>	<b>Unsatisfactory</b>

CHECK LIST FOR TRANSCRIBING MACHINE  
(sample)

Directions

1. Plug in the headset and foot pedal properly.
2. Plug into electrical socket.
3. Transcribe as many letters on the tape as possible. One mailable letter is better than two unmailable letters. Keep in order. You may number them on the envelope where the stamp would cover.
4. Follow this procedure
  - a. Listen to a few words, stop machine, type.
  - b. Listen to a few more words, stop machine, type. Do not try to keep up with the dictation.
  - c. Ask questions in order to understand details, words, instructions. The "employer" wants mailable letters. They are worthless if not mailable.
5. Suggestions for typing mailable letters
  - a. A large dictionary and zip code book are on the shelf. Use them.
  - b. Have a typing eraser or correction tape. Make very neat erasures.
  - c. Make all corrections as you go--letters should not need retyping.
  - d. Ask to have your first letter (including envelope) checked before starting second one. Get this one mailable before going to the second letter.
6. Get letters in order, envelope on top of each, address side up.



### CHECK LIST FOR STENCIL DUPLICATION

(sample)

1. Plan Layout--get approval
2. Prepare stencil
  - a. Clean type, disengage ribbon
  - b. Insert cushion sheet or typing plate
  - c. Type slowly, evenly
  - d. Roll stencil carefully to correct with fluid
  - e. Proofread, while stencil is in machine
3. Run stencil
  - a. Plug in machine, switch on; operate inking device for center, right, left, till glossy--but don't get too much ink!
  - b. Install stencil, backing sheet up, left end first
  - c. Spread right hand across stencil, turn handle once
  - d. Depress proof button, turn around once to distribute ink
  - e. Tear off backing sheet, fold, throw away
  - f. Install mimeograph paper, rough side up
  - g. Make trial run on used paper, do not touch wet print
  - h. Switch on, lower feed lever
  - i. Check inking and centering on page; adjust
  - j. Get approval
  - k. Decide number of copies, set counter. (Hundred or tens?)
  - l. Make copies; (but do not straighten while wet)
4. File stencil, after cleaning, for future use; see others in cabinet
5. Place paper in package, rough side turned correctly
6. Leave drum in proper position
7. Clean duplicator, desk, hands, with hand cleaner
8. Put supplies in proper places
9. Fold, cut, or staple copies if necessary
10. Jog copies, fasten best way (as directed), place on desk

#### IV. EVALUATION, STANDARDS OF PERFORMANCE, TESTING AND GRADING

- A. Teacher-prepared objective tests will test knowledge of machines and processes.
- B. Assign a job to be done under simulated business conditions. A comparison of the time required and the quality of the work will determine the level of vocational competency.

Most duplicating production work must be evaluated subjectively by the instructor according to the criteria listed below. A pupil's marks should be based on the degree of professional appearance of his work and the time required to complete the work.

1. Liquid duplication
  - a. No errors in typing, writing, spelling or strike-overs on the finished product
  - b. Even touch in typing masters
  - c. Good placement and arrangement
  - d. No wrinkles or creases in master or product
  - e. Good distribution of fluid
  - f. Proper use of machine; left in good condition
  - g. Working area left in good condition
2. Stencil duplicating
  - a. Errors in content due to misspelled words, omission of words (or lines!)
  - b. Weak touch; heavy touch, causing holes in stencil for some letters, such as a, o
  - c. Arrangement and placement, horizontal and vertical
  - d. Poor or uneven inking of stencil
  - e. Improper preparation of stencil for filing
  - f. Failure to put away all materials used and leave area in good condition
3. Photocopy duplicating
  - a. Are copies clear and readable?
  - b. Is type of paper suited to purpose of duplicating?
  - c. Was correct number of copies prepared?
  - d. Is student aware that several methods of photocopying are in use, based on different principles and under different trade names, and that he can learn to operate them on the job by reading and following directions, and being willing to practice on the specific machine?
4. Basic questions to ask for all duplicating, from carbon copies on up the scale
  - a. Did student use proper paper?
  - b. Can he follow directions?
  - c. Was he wasteful with supplies?
  - d. Did he make proper adjustments for operating and leaving the machine?
  - e. Does he understand procedures well enough to repeat on another job?
  - f. Are duplicated copies
    - (1) A superior
    - (2) B above average
    - (3) C useable
    - (4) D not useable
5. Transcribing Equipment
  - a. Work should be judged on degree of mailability, or usability, which is more important than transcription rate. The important question is: "Will it meet the standards of the 'main office'?"
  - b. Best students will perhaps be typing 4 to 6 average-length mailable letters in an hour of transcribing; average may type 3 or 4.

V. TEXTBOOKS AND TEXTBOOK REFERENCES AND  
VI. BOOKLETS, PERIODICALS, JOURNALS, MAGAZINES AND MONOGRAPHS

**For Duplicating Machines**

Agnew, Meehan, Oliverios. *Secretarial Office Practice*. Cincinnati: South-Western Publishing Co., 1966. 00351-195.

Agnew, Meehan & Pasewark. *Clerical Office Practice*. South-Western Publishing Co., 1967, pp 329-373.

Archer, Brecker, Frakes, Steward. *General Office Practice*. McGraw-Hill, 1968, pp 251-288 (dupl.); pp 184-194 (trans.)

Friedman & Grossman. *Modern Clerical Practice*. Pittman Publishing Corp., 1968, pp 336-349 (dupl.); pp. 358-351 (voice-writing)

*Fundamentals of Mimeographing*. A.B. Dick, School Department.

*Fundamentals of Offset*. A.B. Dick Company, Educational Services Department.

Gregg, Fries, Rowe, Travis. *Applied Secretarial Practice*. McGraw-Hill, 1962, pp 334-335 (dupl.); pp 358-361 (trans.)

*Hints for Ruling, Lettering and Illustrating*. Gestetner Duplicating Company.

Richards and Wooward. *Duplications Do's and Don'ts* Allied Publishers, Portland.

Straub, Gibson. *Stencil Duplicating. Liquid Duplicating*. William Brown Publishing Company.

**For Transcribing Machines**

Clerical and Office Practice texts listed above (appropriate units).

Course books and operator's manuals prepared by equipment companies.

All dictionaries.

Aurner & Burtness. *Effective English for Business*. South-Western Publishing Company.

Gavin & Hutchinson. *Reference Manual for Stenographers and Typists*. McGraw-Hill.

Haeger, Stewart, Hutchinson. *Business English*. Third Edition, McGraw-Hill.

Haeger, Stewart, Hutchinson. *Business English and Letter Writing*. McGraw-Hill.

*Intensive Clerical and Civil Service Training*. South-Western, Part I, Grammar, Punctuation and Capitalization.

Leslie. *20,000 Words*. McGraw-Hill.

U.S. Postal Service, National Zip Code Directory.

**Business Machines**  
**Duplicating-Transcribing**

**For Miscellaneous Duplicating Machines**

Cansler, Russell H., Editor, *Fundamentals of Mimeographing*, A.B. Dick.

*Gestetner-Stencil Duplicating with the Printed Look*. Gestetner Corporation.

*How to Arrange the Mimeograph Department. How to Select Stencil Sheets. How to Make Corrections. How to Draw a Stencil for a Ruled Form. How to File Stencils for Re-Runs.*  
Personal Instructions--Free A.B. Dick Company.

*Thirty Ways to Get the Most from Your Duplicator*. Gestetner Duplicating Corporation.

**VII. FILMS, FILMSTRIPS, TAPES, RECORDS, TRANSPARENCIES, OPAQUE PROJECTIONS, CHARTS AND MODELS**

**Filmstrips**

"The Information Machine." IBM

"The Master and the Fluid Duplicator." "The Stencil." The Mimeograph." A. B. Dick Filmstrip.

**Films**

"Mimeograph Techniques." Bailey Films, 5409 DeLongpre Avenue, Hollywood, Calif. 90028.

"The Secretary Transcribing." Coronet Instructional Films, 1966.

"Why Punctuate?" McGraw-Hill.

**Sources of Educational Materials**

Bureau of Operations, Postal Services Division, Washington, D. C. 20025.

Business Education Films, 4707 Sixteenth Avenue, Brooklyn, New York 11204.

Brown, William C., Co. Publishers, 135 S. Locust Street, Dubuque, Iowa 52002.

Dick, A.B. Company, The School Department, 5700 St. Touhy Avenue, Chicago, Ill 60612.

Ditto, Inc., Harrison at Oakley Blvd., Chicago, Ill 60612.

Gestetner, Duplicator Corp., 324 Fifth Avenue, New York, N.Y. 10001.

IBM Corporation, 590 Madison Avenue, New York, N.Y. 10022.

McGraw-Hill Book Co., Inc., 330 W. 42nd Street, New York, N.Y. 10036.

Pitman Publishing Corp., 20 East 46th Street, New York, N.Y. 10017.

South-Western Publishing Company, 11 Guittard Road, Burlingame, Calif. 94010.

Stenotype Company, 417 Dearborn Street, Chicago, Ill 60605.

## VIII. EQUIPMENT AND SUPPLIES

The decision concerning selection of specific equipment will be influenced by the teacher's and administrator's estimate of the importance of each of the factors involved in reaching that decision. Ordinarily, a piece of equipment or a machine should be selected on the basis of use in the business area served. It should not be so specialized that employers prefer to train their own operators; so complicated that it is inappropriate for classrooms; so simple to operate that training in its operation is unnecessary.

Ordinarily, the machine should be suitable for training beginning office workers. The machine should be typical of its class in the techniques required. Renting may permit the use of a variety of machines for an expenditure which would result in the purchase of only one machine.

### A. Basic general office equipment

1. Teacher's desk(s)
2. Teacher's office chair(s)
3. Side chairs
4. Typing desks, adjustable
5. Contour chairs for use at typing desks and office machine tables
6. Supplies cabinet
7. File cabinet, 4 to 5 drawers
8. Electric duct wiring, or floor system installed, for multiple outlets
9. Scissors, cellophane tape, stapler, paper clips, hand cleaner

### B. Duplicating and copying

1. Dictating-transcribing machines, complete with microphone, foot pedal, etc. such as Dictaphone (with one-time belt), Stenocord (re-usable belt), McGraw-Edison (disc) or tape, Norelco (tape), Stenorette (tape)
2. Liquid Duplicators, as Ditto, or A.B. Dick
3. Stencil Duplicator, as A.B. Dick Mimeograph or Gestetner Mimeograph, or Gestofax
4. Illuminated drawing board--Mimeoscope or Tempo-Scope
5. Stencils with various rulings and master sets, various colors if desired
6. Assorted styli, shading plates, lettering guides, T-square, flexible writing sheet, correction fluid
7. Photocopy duplicating equipment--Thermofax or Xerox
8. Paper supply for all duplicating processes

**Business Machines**  
**Duplicating-Transcribing**

9. Typewriters: manual and electric, including one IBM Selectric, with several typing heads, one IBM Executive, one wide-carriage
10. Copyholders
11. Collator or rack
12. Overhead projector and screen
13. Paper cutter, waste baskets, pencil sharpeners, inks, fluid, 3-hole punch

## **IX. LAYOUT AND FACILITIES**

A one-room unit has been designed which can prove satisfactory to accommodate the business education program, including instruction in office machines, in the small high school with an enrollment under 100. A two-room suite is more adequate, and can accommodate enrollments up to 300, if of sufficient size, well-arranged and lighted. Expansion for larger enrollments can usually be accomplished simply by adding an all-purpose classroom, as the machine stations will be already in existence. (South-Western Publishing Company, Monograph 81 has good descriptions and diagrams for layouts for schools of various sizes.)

Typing and office machines rooms should include the following items:

- A. Tables
  1. Typing tables, heights from 26" to 30"
  2. Machine tables, about same height
  3. Work tables
- B. Chairs
  1. All purpose; saddle seat, curved back or contour
- C. Desk
  1. Teacher's
  2. Other office desk, economics permitting
- D. Work Area
  1. Counter, with storage section below
  2. Sink set into counter
- E. Filing Cabinet
  1. One 4-5 drawer filing cabinet, legal size preferred

F. Closet Storage

G. Electric Outlets

1. Wall outlets, or wall strips, convenient height, sufficient for machines on counters and tables
2. Permanently installed floor outlets, or electruct floor outlets for electric typewriters and transcribing units
3. Master cut-off switch for electrical outlets





# BUSINESS MATHEMATICS

One semester course

Grades 10 or 11

Basic

Business Mathematics is designed to review and/or develop skills in the basic mathematical processes that apply to computational situations faced each day by consumers and business workers. It deals with mathematics applicable to fundamental skills, payrolls, percentages, interest, discounts, insurance, commissions, taxes, cash transactions, investments and various forms of credit. It is suggested that this course not be a substitute for a general mathematics course requirement.

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VI. BOOKLETS, PERIODICALS, JOURNALS, MAGAZINES . . . . .	104
VII. FILMS, FILMSTRIPS, TAPES, RECORDS, TRANSPARENCIES, OPAQUE PROJECTIONS, CHARTS AND MODELS . . . . .	104
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## I. OBJECTIVES\*

The student will:

- A. demonstrate a proficiency in the basic fundamental skills of addition, subtraction, multiplication, division, fractions and percent
- B. apply the use of mathematics involving typical situations faced by consumers
- C. apply the use of mathematics involving personal finances, savings, housing, transportation and tax computations that are experienced by every citizen
- D. demonstrate proficiency in the use of mathematics common to most businesses.

## II. UNITS--TOPICAL OUTLINE

The exact content for a given class will depend upon the proficiency that the students bring to class. Comprehensive pre-tests should be used to discover where strengths and weaknesses lie. Then, should need for relearning and drill be discovered, the students will have the proper motivation for such a review. The student will be more interested if actual business problems in his interest area are used.

- A. Comprehensive pretest
- B. Introduction to business mathematics
  - 1. Relationship of math to business and personal life
  - 2. The importance of accuracy
  - 3. The importance of logical answers
- C. Whole numbers
  - 1. Addition: checking by accountants' method and casting out nines
  - 2. Subtraction
  - 3. Multiplication
  - 4. Division
  - 5. Factoring, greatest common divisor, and least common multiple
- E. Decimal fractions
  - 1. Reading and writing
  - 2. Aliquot parts
  - 3. Addition, subtraction, multiplication, division

\*The minimum acceptable standards should be determined by the individual teacher. Suggested standards are given in Chapter IV of this section.

4. Shortcuts
- F. Percentages
1. Meaning, expression and reduction
  2. Finding unknown numbers
  3. Finding increases and decreases
- G. Financial records and reports
1. Payroll records and reports
    - a. Computing wages
    - b. Time cards
    - c. Payroll deductions
    - d. Currency breakdown
  2. Basic business records
    - a. Petty cash
    - b. Customer's accounts
    - c. Inventory records
    - d. Equipment records
    - e. Reconciling the check records, bank statements
  3. Presenting business data
    - a. Measures of central tendency
    - b. Broken line graph
    - c. Bar graph
    - d. Interpreting graphic data
- H. Money and banking
1. Computing interest
    - a. Introduction to methods of computing interest
    - b. Using time tables
    - c. Using tables to compute simple and compound interest
  2. Borrowing and lending money
    - a. Maturity date--terms of discount
    - b. Notes and drafts
- I. Distribution
1. Buying
    - a. Trade discounts
    - b. Discount series
    - c. Computing cash discounts
  2. Pricing
    - a. Mark on and markdown
    - b. Computing retail price
    - c. Computing cost price

3. Selling
  - a. Commission sales
  - b. Discount rates
  - c. Installment charges
  - d. Interest rates on installment sales
  
4. Shipping Merchandise (optional)
  - a. Freight by rail
  - b. Truck
  - c. Parcel post
  - d. Airmail
  
- J. Investments
  1. Distribution of income
    - a. Corporate earnings
    - b. Partnership profits
    - c. Dividing assets in bankruptcy
  
  2. Stock and bond purchases and sales (optional)
    - a. Understanding stock market quotations
    - b. Brokerage fees
    - c. Taxes on sale
    - d. Rate of return
  
- K. Personal finance (optional)
  1. Insurance
    - a. Fire
    - b. Automobile
    - c. Life
    - d. Probability
    - e. Social security
  
  2. Taxes
    - a. Property
    - b. Retail
    - c. Income (federal and state)
  
  3. Automobile Ownership
    - a. Buying on time
    - b. Buying through cash loans
    - c. Cost of automobile ownership
  
- L. Special applications
  1. Data processing
    - a. Understanding systems of numeration
    - b. Binary system
  
  2. Practical measurements for homeowner (optional)
    - a. Measurements
    - b. Computing cost of utilities
    - c. Metric system
  
  3. Employment tests
    - a. Business employment tests
    - b. Government employment tests

### III. TEACHING METHODS

- A. Evaluate the skills and abilities of the class by the use of a comprehensive pre-test.
- B. Plan units of instruction in accordance with these predetermined abilities.
- C. Use step-by-step method of the presentation in solving the various problems showing any possible shortcut methods that could be used.
- D. Use discussion method, case problems, role playing and class projects.
- E. Use individualized instruction where needs of student dictate.
- F. Use business machines in conjunction with the teaching of business mathematics.
- G. Use the "why" as well as the "how" method in your instruction.

### IV. EVALUATION, STANDARDS OF PERFORMANCE, TESTING AND GRADING

- A. Evaluate for new methods or material on a one-step-at-a-time basis. Teach one step; then test until all steps are presented; then give final general test at the end of each presentation.
- B. Test for the use of short-cut methods in determining answers.
- C. Test for accuracy.
- D. Test for comprehension of what is asked for in "statement" problems.
- E. Evaluate the answer by "does the answer make sense" method.
- F. Teacher-made tests may be helpful in measuring progress at frequent intervals.

### V. TEXTBOOKS AND TEXTBOOK REFERENCES

*Applied Arithmetic Essentials*. 3rd Edition, H.W. Rowe Company.

Adams, Lovincy J. *Modern Business Mathematics*. Holt, Rinehart and Winston.

Cissell and Bruggeman. *Mathematics for Business and Economics*. Houghton-Mifflin, 1963.

Gossage and Briggs. *Mathematics Skill Builder*. 3rd Edition, 1969, South-Western. Also available: Programmed supplement to Mathematics Skill Builder.

Huffman and others. *Mathematics for Business Occupation*. 3rd Edition, 1968, Gregg Publishing. Designed for average or below-average 9th-10th grade students.

Huffman and Schmidt. *Programmed Business Mathematics: Concepts, Skills and Applications*. 2nd Edition, 1968, Gregg Publishing.

Lasley and Mudd. *New Applied Mathematics*. 6th Edition, 1964, Prentice-Hall.

## Business Mathematics

Piper and others. *Applied Business Mathematics*. 6th Edition, 1964, South-Western.

Rosenberg and Lewis. *Business Mathematics*. 7th Edition, 1968, Gregg Publishing. Also available in two versions of traditional or modern math.

Rosenberg and Lewis. *Essentials of Business Mathematics*. 6th Edition, 1964, Gregg Publishing.

## VI. BOOKLETS, PERIODICALS, JOURNALS, MAGAZINES AND MONOGRAPHS

*Balance Sheet*

*National Business Education Quarterly*

*Journal of Business Education*

*The Secretary*

*Business Education*

*Forum*

*Fortune*

*U.S. News and World Report*

U.S. Civic Service sample exams

State Merit sample exams, Helena, Montana

### Catalogs

EDL--Skill Builder--for developing mathematical skills

Gregg-McGraw-Hill

Harvard Supply Company, Box 32, Melrose, Mass. 02176

Pitman Publishing Corp., 20 East 46 Street, New York, N.Y. 10017

Rowe

South-Western

Vrbancek, Joseph J. *Mathematical Teaching Aids*. Chicago Teachers College, Chicago, Ill. A complete bibliography of teaching aids for business arithmetic, including films, filmstrips, references for sources of additional visual aids, lists of books and periodicals, a bibliography of free and inexpensive material.

## VII. FILMS, FILMSTRIPS, TAPES, RECORDS, TRANSPARENCIES, OPAQUE PROJECTIONS, CHARTS AND MODELS

Refer to catalog section of previous chapter or refer to Chapter VII of Basic Business or Chapter VIII of Consumer Economics

## VIII. EQUIPMENT AND SUPPLIES

Appropriate desks and chairs

Demonstration desk, table or area

Overhead projector (portable)

Filmstrip projector

Slide projector

Movie projector

Suitable projection screen

Movable projection stand

Tape recorder

Record player

Other minor office supplies as they may be necessary

## IX. LAYOUT AND FACILITIES

The layout of a room that is to be used for Business Mathematics is secondary in nature because any room that is large enough to accommodate the class size and is properly lighted will generally serve the purpose quite well. However, it is imperative that the room have sufficient facilities that may be arranged by the class for class activities.

Recommended facilities include the following:

- Bulletin board space
- Blackboard
- Sufficient storage space
- Sufficient filing space
- Display space
- Flannel board
- Book shelves
- Blackout curtains





# BUSINESS COMMUNICATIONS

One semester

Grades 10, 11, 12

Basic

This course is designed to give a good review of basic English as it applies to the communications of the business world. It will give the student a solid background in the different areas of communications—oral and written—that are used in an office and the importance of each as it relates to the smooth functioning of an office. The course will involve the use of many practical applications in learning about the communications of business.

Typing may be a prerequisite. However, business communications may be taken concurrently with the second semester of typing.

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## Business Communications

### I. OBJECTIVES:\*

The student will:

- A. spell and use correctly a variety of business terminology
- B. express knowledge of the vital importance of effective English in assuring personal, social and business success
- C. demonstrate self-confidence in speaking
- D. increase his business vocabulary
- E. correctly use basic language arts skills in written and/or oral communications
- F. write a variety of acceptable business communications
- G. listen attentively, comprehend and respond intelligently
- H. follow directions.

### II. UNITS TOPICAL OUTLINE

- A. Communication in business—how business situations involve:
  1. Talking
  2. Writing
  3. Listening
  4. Following directions
- B. Business vocabulary
  1. Use of reference material
  2. Vocabulary
    - a. Meaning of words
    - b. Using words appropriately
  3. Spelling
    - a. Rules of spelling
    - b. Spelling of specific terms
- C. Grammar review
  1. Word usage
  2. Punctuation

\*The minimum acceptable standards should be determined by the individual teacher. Suggested standards are given in Chapter IV of this section.

3. Capitalization
  4. Abbreviations
  5. Writing effective sentences
  6. Writing effective paragraphs
- D. Introduction to oral communications—its effect on business
1. Communication by speech
    - a. Pronunciation
    - b. Spelling
    - c. Diction
  2. Physical appearance
    - a. Personal hygiene
    - b. Grooming
    - c. Proper attire
- E. Types of oral business communications
1. Making correct introductions
  2. Face-to-face conversations
  3. Telephone conversations
  4. Giving an oral report
  5. Effective listening
- F. Introduction to written business communications
1. Effective business letters
    - a. Types of letters
    - b. Purpose of letters
    - c. Quality of letters
  2. Parts of the business letter
  3. Styles of business letters
- G. Types of written business communications
1. Writing letters that ask and transmit
  2. Writing letters that answer
    - a. Acknowledgments
    - b. Responses
    - c. The secretary's responsibility for these types of letters
  3. Writing claim and adjustment letters
  4. Writing credit and collection letters

## Business Communications

5. Writing sales letters
  6. Writing public relations letters
  7. Writing social-business letters
  8. Writing special problem letters
  9. Writing other correspondence
    - a. Form letters
    - b. Memorandums
    - c. Telegrams, minutes, news releases
    - d. Business reports
- H. Job application and interview
1. Employment and interview
  2. Letter of application
  3. Personal data sheet
  4. Application form
  5. Interview
  6. Follow-up letter
  7. Employment retention
  8. Employment termination

## III. TEACHING METHODS

- A. Textbook method of presentation, discussion and assignments should be used for learning facts, rules and English grammar. As many reference materials as possible should be used in conjunction with the textbook.
- B. Small groups of 10 to 15 students can work in conference with a group leader to discuss problem situations within their own range of experience.
- C. The class is divided into small groups to discuss a problem for a limited number of minutes. Each group has a chairman and a reporter, one of whom acts as spokesman for the group in reporting ideas, recommendations and opinions to the entire class.
- D. Individuals or small groups from within the class identify the facets of a case problem. The purpose is not to come up with answers, but rather to speculate about certain unknown factors or elements. Experience is gained in amplifying and then pinpointing the problem.
- E. Students' role play a realistic situation in which they are forced to think and speak in terms of characteristics being portrayed. This characterization should help students recognize the feelings, prejudices and frustrations of others.

- F. The students write actual letters to businesses. These letters might be inquiries, requests, invitations, etc.
- G. Include and emphasize as much proofreading as possible.
- H. Ask resource persons from business to serve as guest speakers in as many areas and as much as possible.
- I. Have the students prepare reports in various areas. These reports may be written or oral, and may be prepared and presented by groups of various sizes.
- J. Take field trips to businesses to observe the business in operation.
- K. Arrange to have students interviewed by one or more businessman. This interview may also include a letter of application, personal data sheet and a follow-up letter.
- L. Include dependability, accuracy, cooperation and initiative in as much of the course as possible to build and develop these desirable attitudes and traits.
- M. Use a tape recorder in all facets of oral communications.
- N. Use a video-tape recorder in oral communications where applicable.

#### IV. EVALUATION, STANDARDS OF PERFORMANCE, TESTING, AND GRADING

- A. All letters and other written work that serve as a measure of achievement and progress should be considered.
- B. When particular abilities are to be tested, one of several of the following methods may be used.
  - 1. Assignments in composing and writing business letters and reports can be used as a basis for checking students' use of words, sentence structure, spelling, punctuation, mechanics, application of principles of grammar and application of principles pertaining to effective business letters.
  - 2. An effective procedure is to give three separate marks for each element of the letter — layout, content and English usage. Predominant consideration is given to the particular objective of the instruction.
  - 3. When recognition of letter styles or types of letters are to be tested, samples of actual letters illustrating these styles and types may be presented for identification either through duplication or overhead projection.
  - 4. Oral expression may be measured by a simple rating scale, prepared by the teacher, for checking abilities in the use of words, voice, tone and poise.
  - 5. The progress of the individual in vocabulary development can be measured by comparing the results of a test given at the beginning of the course with the results of a similar test at the close of the course. For this testing of vocabulary, standardized tests may be used but teacher made tests are an additional means of measurement.

## Business Communications

6. Particular areas of grammar, punctuation and capitalization may be tested by means of diagnostic and achievement tests given at intervals and at the end of the course. A comparison of the results of an achievement test with the results of pretests will show the students growth in that area. The testing may be particularized by asking the student to write an assignment and telling him that he is to be rated on any one or all of these attainments, (a) spelling, (b) sentence structure, (c) grammar, (d) content, (e) layout.
- C. Newly learned human relations practices do not readily lend themselves to measurement of achievement. The results are tangible but the subject matter is not. Some suggestions for evaluation are
1. self-evaluation rating sheets at the beginning of the year and repeated at various times throughout the year
  2. role-playing
  3. individual conferences with students to identify how he perceives himself
  4. individual conferences for teacher evaluation of student behavior

## V. TEXTBOOKS AND TEXTBOOK REFERENCES

Most of the textbooks in this area are designed primarily for a two-semester course and present basic English grammar. Since business communications is a one-semester course and covers far more than English grammar, it is felt that only selected parts of this type of textbook or a text-workbook of English grammar be used as a basic text with vast classroom resources available for students and teacher use.

### Textbooks

Steward, Zimmer, Lanham. *Business English and Communication*. Third Edition, New York, Gregg Publishing Division, McGraw-Hill Book Company, Inc., 1969.

Schachter. *English the Easy Way*. Third Edition, Cincinnati, South-Western Publishing Company.

Aurner and Burtness. *Effective English for Business*. Sixth Edition, Cincinnati, South-Western Publishing Company.

### Textbook References for the Teacher and Students.

Brendel and Near. *Spelling Drills and Exercises*. Programmed for the typewriter, New York: McGraw-Hill, 1964.

Brendell and Near, *Punctuation Drills and Exercises*. McGraw.

Brendell and Leffingwell. *English Usage Drills and Exercises, Programmed for the Typewriter*. McGraw-Hill.

Cleary. *English Style Skill Builders*. McGraw-Hill.

Crank, Crank, and Connelly. *Words*. Fifth Edition, New York, McGraw-Hill.

Gavin and Sabin. *Reference Manual for Stenographers and Typists*. Fourth Edition, McGraw-Hill, 1970.

Henderson and Voiles. *Business English Essentials*. Fourth Edition, New York, McGraw-Hill, 1970.

House and Koebele. *Reference Manual for Office Personnel*. Fifth Edition, Cincinnati, South-Western Publishing Company.

Hutchinson, Lois Irene. *Standard Handbook for Secretaries*. Eighth Edition, New York, McGraw-Hill, 1970.

Lamb, Marion M. *Word Studies*. Sixth Edition, Cincinnati, South-Western Publishing Company.

Leslie, Louis. *20,000 Words*. Fifth Edition, New York, G. P. Putnam and Sons, 1965.

*Mead Letter Evaluator, Mead Letter Evaluator Score Sheet for Evaluating, and Portfolio of Sales Letters*. Free, Mead Papers, Inc., 118 First Street, Dayton, Ohio.

*Model Letter Kit*. Remington Rand, Inc., 315 Fourth Avenue, New York, New York.

*Postal Manual*. U. S. Government Printing Office.

Saw. *Spell it Right*. New York, Barnes and Nobel.

Reed. *Business English*. McGraw-Hill.

*Roget's Thesaurus in Dictionary Form*. New York, G. P. Putnam and Sons, 1965.

## VI. BOOKLETS, PERIODICALS, JOURNALS, MAGAZINES AND MONOGRAPHS

### Booklets

*All Numbers Calling. Hello – I Want to Speak to the Oven. How to Make Friends by Telephone. Machine Talk. Telephone Personality Tips. The Secretary and the Telephone*. Local Bell Telephone Office, free pamphlets.

*A Guide to More Effective Communication*. General Electric Company, One River Road, Building 36, Schenectady, New York 12305.

List of free materials available to secondary school instructors, Educational Service Bureau, Dow Jones & Company, Inc., 200 Burnett Road, Chicopee, Mass. 01021.

### Periodicals and Journals

*American Business Education*.

*The Balance Sheet*. 5101 Madison Road, Cincinnati, Ohio 45227.

*Business Education World*. 330 West 42nd Street, New York, New York 10036.

*Business Education Forum*. 1201 16th Street, N.W., Washington, D. C., 20006.

## Business Communications

*The Journal of Business Education.* 15 South Franklin Street, Wilkes-Barre, Pennsylvania 18701.

*The National Business Education Quarterly.* 1201 16th Street, N.W., Washington, D. C. 20006.

*The Office.*

*Office Supervisors' Bulletin.*

*Sincerely yours.*

## Monographs

Gladwith, Ellis. *Speak When You Write.* Connecticut Mutual Life, Hartford, Connecticut 06115, 1961.

*Making the Most of Your Job Interview.* New York Life Insurance Company, 61 Madison Avenue, New York, New York 10010.

## VII. FILMS, FILMSTRIPS, TAPES, RECORDS, TRANSPARENCIES, OPAQUE PROJECTIONS, CHARTS AND MODELS

Contact the Office of the Superintendent of Public Instruction, state colleges and universities for information on available audio-visual aid materials and equipment.

Request visual aids catalogs from film outlets. A large number of films are available on a rental basis, some are free, and others must be purchased.

For filmstrips, tapes, records, transparencies, opaque projections, charts and models refer to:

1. price lists of publishers of textbooks
2. *Teacher's Manual* for the textbook
3. *Visual Aids for Business*, Monograph 92, South-Western Publishing Company
4. *Gregg Instructional Aids Catalog and Guide*, McGraw-Hill Book Company, Inc.
5. write for free materials listed in various business education publications.

Keep a record about the film or filmstrip—when and to whom it was shown, what it was about, if it is suitable, sound or silent, free or rental, color or black and white.

In order that this list may be brought up-to-date in the future, keep accurate records so that revisions and additions may be made.

Keep a list of worthwhile supplementary materials you have used in your classroom so it may be included in the future.



## Films

\*"Communications," 12 min. \*"Conversation," 12 min. "Say What You Mean," 20 min. \*"Using Your Voice," 10 min. "Is There Communication When You Speak?" 17 min. "First Job," "Getting a Job," and "Getting a Job and Keeping It," 10 min. each. Text Film Division, McGraw-Hill Book Company, 330 West 42nd Street, New York, New York 10036.

"English Noun Constructions," 30 min. "English Verb Constructions," 30 min. "Hiding Behind the Dictionary," 29 min. "Sentence Variety and Grammar," 30 min. Indiana University, Bloomington, Indiana 47405.

"The Exact Small Thing," 30 min. "From Sentences to Paragraphs," 30 min. "Grammar: Part I" 30 min. "Grammar: Part II," 30 min. \*"Nouns and Verbs Versus Adjectives and Adverbs," 30 min. "Writing Forceful Sentences: Part I," 30 min. "Writing Forceful Sentences: Part II," 30 min. "Who Wrote That," 13 min. Association Films, Inc., 25358 Cypress Avenue, Hayward, California 94544.

\*"Fundamentals of Public Speaking," 10 min. "Group Discussion," 10 min. "Is There Communication When You Speak," 17 min. "Speech: Conversation," 10 min. "Speech Preparation," 15 min. \*"Better Choice of Words," 10 min. \*"Build Your Vocabulary," 11 min. \*"Building Better Paragraphs," 12 min. \*"Building an Outline," 10 min. \*"Making Sense with Sentences," 12 min. "Making Sense with Outlines," 12 min. \*"Making Yourself Understood," 14 min. \*"Effective Listening," 10 min. \*"Grammar: Verbs and Why We Use Them," 11 min. "Getting the Facts," 11 min. "High Speed Reading," 8 min. "How to Remember," 10 min. "Improve Your Pronunciation," 11 min. "Improve Your Spelling," \*"Speeding Your Reading," 10 min. \*"Why Punctuation?" 11 min. \*"Writing Better Business Letters," 10 min. \*"Writing Better Social Letters," 10 min. \*"Eight Parts of a Business Letter," 11 min. \*"How to Keep a Job," 11 min. \*"Look It Up (Dictionary Habits)," 11 min. Business Education Films, 4607 16th Avenue, Brooklyn, New York 11204.

"Getting a Job," 16 min. \*"Office Courtesy – Meeting the Public," 12 min. \*"Office Etiquette," 16 min. "Office Teamwork." Encyclopedia Britannica Films, 425 North Michigan Avenue, Chicago, Illinois 60611.

"One Out of Every Six," 15 min. Prudential Insurance Company of America, Newark, New Jersey.

"Person to Person Communications," 16 min. Murray Gold Productions.

## Filmstrips

"Adjectives and Adverbs," color, 50 frames. "Nouns and Their Uses," color, 50 frames. "Prepositions and Conjunctions," 50 frames. "Pronouns and Their Uses," 50 frames. "Simple Sentences," 50 frames. "Verbs," color, 50 frames. Complete Set "Fundamental of English Series." "Adjective Clauses and Relative Pronouns," 45 frames. "Adverbial Clauses and Complex Sentences," 45 frames. "Compound Sentences: General Review," 45 frames. "Linking Verbs and Predicate Nominative," 45 frames. "Transitive Verbs and Direct Objects," color, 45 frames. "Using Perfect Tenses: Building Sentences," 45 frames. Complete Set "Coach for Good English Series." "Consonant Sound," 42 frames. "Hearing Sounds in Words," 42 frames. "Letters Which Work Together," 42 frames. "Long Vowel Sounds," 42 frames. "Studying Long Words," 42 frames. "Tricky Consonant Sounds," 42 frames. Complete Set "Goals in Spelling." McGraw-Hill Book Company, 330 West 42nd Street, New York, New York 10036.

\* Films available at the Montana State Film Library, Office of the Superintendent of Public Instruction, Helena, Montana 59601.

## Business Communications

"In Addresses and Dates," 40 frames. "In A Series," 43 frames. "In Miscellaneous Usage," 34 frames. "With Appositives and Parenthetical Expressions," 34 frames. "With Clauses and Phrases," 46 frames. "With Direct Address, Introductory Words, Final Query" 37 frames. Complete Set "The Comma." "Apostrophe and Quotation Marks," 55 frames. "Capitalization," 40 frames. "Colon and Semicolon," 55 frames. "End Punctuation," 55 frames. "Italics & Hyphen," 40 frames. Complete Set "End and Other." Society for Visual Education, 1345 W. Diversey Parkway, Chicago, Illinois 60614.

### Transparencies

"English 1--Outlining and Figures of Speech," 552.\* "English 2--Nouns and Verbs," 596.\* "English 3--Adjectives and Adverbs," 597.\* "English 4--Prepositional Phrases," 598.\* "English 5--Dependent Clauses," 599.\* "English 6--Conjunction," 600.\* "English 7--Sentence Building," 601.\* "English 8-- Basic Speech," 641.\* "English 16--Advanced Punctuation," 655.\* "English 17--Compound and Complex Sentences," 656.\* "English 18--Capitalization," 700.\* "English 19--Composition: Writing Effective Sentences Part I," 701.\* "English 20--Composition: Writing Effective Sentences Part II," 702.\* "English 21--Composition: Using Transitions," 703.\* 3-M Company, 4835 Para Drive, Cincinnati, Ohio.

"Series III--Job Application and Job Interview," 14 transparencies, \$40. "Overview of Job Application and Job Interview," JA-1.\* "Get Acquainted with Yourself," JA-2.\* "Social Security and Tax Account Number," JA-3.\* "Related Items for Classroom Discussion," JA-4.\* "Preparation," JA-5.\* "Compare Viewpoints," JA-6.\* "The Application Letter," JA-7.\* "Data Sheet," JA-8.\* "Card of Introduction (Sample)," JA-10.\* "Tips for the Interview," JA-12.\* "Interview Rating Sheet," JA-13.\* "Employee's Withholding Exemption Certificate," JA-14.\* Colonial Films, Inc., 70 Fairlie Street, N.S., Atlanta, Georgia 30303.

### Dictation Tapes

Grammar Punctuation Dictation Tapes. Set. No. 1 (\$49.50). Ten 25-Minute tapes designed to develop hearing and listening comprehension while teaching grammar and usage. Includes key. Tape 1 - "Comma in clauses, phrases and parenthetical expressions. Tape 2 - Comma in series of words and phrases and following introductory words or phrases. Tape 3 - Comma with interrupting words, clauses and phrases. Tape 4 - Comma, apposition. Tape 5 - Semicolon and colon. Tape 6 - Possessives. Tapes 8-10 - Reinforcement exercises.

## VIII. EQUIPMENT AND SUPPLIES, LAYOUT AND FACILITIES

This course should be held in a classroom equipped with typewriters. The class can be scheduled to meet in the room of the business department that is equipped for office practice with L-shaped desks, telephone equipment, typewriters and posture secretarial chairs. Please refer to this section under typing and office practice for more specifics about equipment and supplies, layout and facilities.

\*Catalogue No.

# TYPING I

One semester or one year

Grades 10, 11, or 12

Basic and Vocational

Typing is recommended for all secondary school students. The course includes good operating techniques, care of the typewriter, and work attitudes during the development of accuracy and speed. Speed with accuracy is stressed on straight copy work and in typing letters and tabulations, using ruled forms, making carbon copies, typing from rough drafts, typing manuscripts, composing at the typewriter, proofreading and correcting errors.

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## Typing I

### I. OBJECTIVES\*

The student will complete the following tasks.

- A. When given a list of the basic operational parts of the typewriter, identify each part on his machine and describe its function in writing.
- B. Demonstrate that he has improved his basic typing techniques by a weekly self-evaluation and teacher evaluation.
- C. When given a typewriter of any make in the classroom, pica or elite, randomly selected by the teacher, demonstrate his ability to set margins by typing three lines each of 50, 60 and 70 spaces.
- D. Demonstrate his ability to set margins of one and/or one and one-half inches on both sides of the paper by typing three lines of each.
- E. When given straight copy (practiced material) with syllabic intensity of no more than 1.40 and of average difficulty, strike the keys by touch using the correct fingering at a minimum rate of 25 to 30 words a minute for five minutes with no more than five errors at the end of the second semester.
- F. When given statistical copy, type the numbers and symbols by touch.
- G. When given ten lines of varying lengths, center vertically and horizontally and type all ten lines on any size paper in a suggested time period of 10 to 15 minutes with all errors corrected.
- H. When given a tabulation problem of 15 to 20 lines with a main heading, secondary heading, columnar headings, and data to be typed in three or more columns, demonstrate his skill of tabulation typing by:
  1. centering the entire problem in either reading or exact vertical center
  2. centering the headings and columns horizontally according to specific directions as to spacing. He will be given 30 minutes, and typographical errors will be either corrected or circled according to the teacher's philosophy.
- I. Prove that he knows the meanings of the standard correction symbols and proofreaders' marks by typing finished copy from a rough draft of 150 to 200 words which has incorporated the correction symbols and proofreaders' marks introduced in the text.
- J. When given a list of 15 subjects selected at random by the teacher or selected by the student and approved by the teacher, compose at the typewriter rough-draft forms. Then he will retype, in finished manuscript form, a one-page composition on the chosen topic. The completed paper will be evaluated by the teacher as follows:
  1. typing errors will be circled
  2. suggestions for improved format will be given

\* The minimum acceptable standards should be determined by the individual teacher. Suggested standards are given in Chapter IV of this section.

3. spelling and grammar will be corrected
4. suggestions for a more logical sequence will be given.

The paper will be returned and the student will rewrite and retype, correcting all typing errors and implementing suggestions of the teacher.

- K. When given an outline of 12 to 13 lines with a title, Roman numerals, headings and subtopics in unarranged form, type the material in correct outline form as specified in the typing text.
- L. When given an unarranged one-page manuscript with a title, type the copy in proper manuscript form with no more than three to five typing or placement errors in 30 to 49 minutes.
- M. Demonstrate that he understands the correct form and placement of business letters.
  1. Given a complete sample business letter appropriately spaced and in correct form, demonstrate that he understands the different letter styles as identified in the text by typing this same letter in each of the styles in the text. Only the letter style need be evaluated if the student remains within an error tolerance of five errors per letter.
  2. Given an actual business letter, supply any parts which have been omitted and place them in proper sequence. The student will then type the entire letter arranging the copy in exact placement and precise form. The student will be able to do this for all letter styles. He will be able to apply this technique to a letter of any length.
- N. When given a list of 25 common business words and a dictionary, type and indicate correct syllabication at all points where the word may be properly hyphenated, according to specified rules.
- O. Demonstrate his ability to proofread his own typed copy by checking his papers for 100 percent accuracy. Papers with uncorrected errors (as determined by the teacher) must be corrected or retyped.
- P. Prove that he erases properly by submitting to the teacher a paper on which he has made the following kinds of corrections:
 

(Good techniques of erasing such as moving the carriage will be observed by the teacher while the corrections are being made.)

  1. change one alphabetic letter to another
  2. change a three-letter word to a four-letter word
  3. change a four-letter word to a three-letter word
  4. change a transposition of two letters into proper sequence
  5. add an omitted letter at the beginning and/or end of a word
  6. a line is typed, paper is removed, erasing is accomplished and paper is reinserted, aligned and corrected.

## Typing I

The corrections will be evaluated by the teacher as follows:

1. the original error is not obvious
2. the correction is clearly printed, and all letters are of the same shading
3. the paper must not have a hold or a smudge
4. all letters must be aligned.

Q. Display an appreciation for desirable work habits by:

1. careful use of supplies and equipment
2. cleaning up his work station every day before he leaves
3. starting and completing assignments as directed by the teacher and the text
4. changing typewriter ribbons
5. cleaning machine.

R. **Personal Application**

Display an interest in the personal application of his typewriting skill by typing rather than hand writing his reports, term papers, class notes, personal letters, etc.

## II. UNITS—TOPICAL OUTLINE

A. Keyboard introduction

1. Paper insertion, straightening and removal
2. Home row position
3. Keyboard presentation
4. Eyes on copy
5. Posture
6. Stroking technique
7. Machine parts and adjustments
8. Position of text, copyholder and extra paper
9. Carriage return

B. Skill drive—both speed and accuracy (not a self-contained unit but should be used intermittently throughout the course)

1. Conditioning practice
2. Technique study for improvement

3. Short, intensive drills for speed or accuracy
  4. Guided writings
  5. Word dictation
  6. Continuity practice
  7. Corrective practice
  8. Timed writings
  9. Games
- C. Centering
1. Horizontal
  2. Vertical
  3. Reading position
- D. Tabulation
1. Placement
  2. Columned material
- E. Manuscripts
1. Exact copy
  2. One-page
  3. Long manuscripts
    - a. Unbound
    - b. Left bound
    - c. Top bound
  4. Headings and footnotes
  5. Typing from rough drafts
  6. Supplementary parts
    - a. Title page
    - b. Outline
    - c. Bibliography
  7. Other
    - a. News releases
    - b. Magazine articles
    - c. Programs

## Typing I

### F. Letters

1. Principal letter styles
  - a. Blocked
  - b. Semi-blocked
  - c. Full-blocked
  - d. Indented
  - e. Other
  
2. Parts of business letters
  - a. Heading
    - (1) Letterhead
    - (2) Date line
  - b. Opening
    - (1) Inside address
    - (2) Salutation
  - c. Message (body)
  - d. Closing
    - (1) Complimentary closing
    - (2) Signature
    - (3) Writer's identification
    - (4) Reference symbols
    - (5) Enclosure reminder
  - e. Mailability
  
3. Envelopes
  - a. Return address
  - b. Correct placement of address for small, large and window envelopes
  - c. Two-letter state abbreviations and zip code
  
4. Stationery
  - a. Standard business size 8½ x 11
  - b. Baronial
  - c. Executive
  - d. Government
  
5. Miscellaneous correspondence
  - a. Form letters
  - b. Two-page letters
  - c. Interoffice memorandums
  - d. Tables in letters

6. Use of carbon paper
7. Special mailing notations
8. Folding of letters

### G. Business forms

1. Purchase orders
2. Invoices



3. Credit memos
4. Payroll forms
5. Checks
6. Bills of lading
7. Telegrams
8. Reports
9. Cards
  - a. Index
  - b. Postal

H. Composing at the typewriter

1. Short answers (one word or so)
2. Paragraphs
3. Short essays
4. Letters

I. Dictation at the typewriter

1. Numbers, words, and phrases
2. Sentences
3. Letters

J. Tables

1. Open
2. Ruled
3. Boxed

K. Numbers and symbols (include characters not on machine)

L. Grammar

1. Punctuation
2. Capitalization
3. Word division
4. Spelling

## Typing I

- M. Applying for a position
  - 1. Letter of application
  - 2. Personal data sheet
  - 3. Application forms
  - 4. Employment tests
- N. Proofreading (include throughout entire course)
- O. Duplicating
  - 1. Typing on masters
  - 2. Typing on stencils
- P. Erasing techniques (introduce toward the end of 1st semester)
  - 1. Erasers
  - 2. Correction tape
  - 3. Other methods
- Q. Miscellaneous
  - 1. Cleaning and caring for machine
  - 2. Changing ribbons

## III. TEACHING METHODS

An effective method of teaching typing combines the whole and the part method permitting the teacher to use that which is better adapted, more effective and practical for the particular skill to be learned.

Good teaching, regardless of the method, must give the student a picture of the whole problem, thus promoting a relationship between the parts of the daily lesson. Each lesson should present a variety of practice material to hold the student's interest. The student should be actually typing about 80 percent of the time he is in class.

- A. Teacher demonstrations should be used from the first day and extend through the entire course. Show how to type using a demonstration typewriter as well as an overhead projector.
- B. Write most of the early presentations on the board first.
- C. Since much of the pupil activity is typing, the teacher must observe the techniques of the students. Give individual assistance as it is needed.
- D. Use a variety of posters, displays, charts, graphs and awards to motivate the class. Keep individual progress records as well as class graphs. Awarding certificates and pins stimulate interest.

- E. The use of the overhead projector, controlled reader, machine charts, films, slides and rhythm and speed records is helpful.
- F. Lecture as needed.
- G. Go over handouts with class.
- H. Use problem solving.
- I. Use production work. Assign a number of projects to complete in 20 minutes or one-half hour.
- J. Review facts using questions and answers

Ways of adjusting to individual differences.

- A. Contract plan. Have minimum and maximum requirements.
- B. Bonus typing. Additional drill material and problems are available. Bonus points may be earned and be a factor in giving honor certificates.
- C. Typing in realistic situations such as:
  1. typing for other subjects
  2. typing of checks, receipts, application for driver's licenses and social security cards and recipes
  3. preparing programs
  4. typing voting lists
  5. typing on registration day during local conventions
  6. typing letters for local business clubs and organizations
  7. addressing envelopes for charitable organizations
  8. typing unorganized problems from rough drafts.

#### IV. EVALUATION, STANDARDS OF PERFORMANCE, TESTING AND GRADING

The timed writings for grading purposes for the first semester will be 3- and 5-minute timings. More errors will be allowable at the beginning of the semester, but at the completion of the semester, the error limit should be one error per minute of typing.

##### First Semester

A recommended grading scale for a five-minute timing with five errors or less might be:

Gross words

Over 40 = A

33 – 39 = B

25 – 32 = C

20 – 24 = D

## Typing I

The final grade at the end of the first semester will include speed and accuracy, techniques and projects.

### Second Semester

At the end of the second semester a recommended grading scale for a five-minute timing with five errors or less might be:

Gross words

Over 60 = A

50 – 59 = B

35 – 49 = C

25 – 34 = D

The final grade at the end of the second semester will include speed and accuracy and projects. It is also recommended that part of the speed grade be based on improvement.

Refer to teacher's manual and National Business Education Entrance Tests for other grading systems.

## V. TEXTBOOKS AND TEXTBOOK REFERENCES

### Textbooks

Lessenberry, Crawford, Erickson, *20th Century Typing*, 9th Edition, South-Western Publishing Company.

Reed, Conover, Prowell, *Comprehensive Typing*, Allyn & Bacon Company.

Rowe, Lloyd, Winger, *Gregg Typing 2d*, 191 Series, Gregg Publishing Company.

Wanous, S. J., *Personal and Professional Typing*, South-Western Publishing Company.

### Textbook References

Aurner and Burtness, *Effective English for Business Communications*, Sixth Edition, South-Western Publishing Company.

Gregg, Fries, Rowe, Travis, *Applied Secretarial Practice*, Fifth Edition, Gregg Publishing Company.

Lessenberry and Wanous, *College Typewriting*, Sixth Edition, South-Western Publishing Company.

Lloyd, Rowe, Winger, *Typing 75* (for colleges), Kits 1-4, Kit 1—Basic; Kit 2—Advanced; Kit 3—Expert, Kit 4—Professional, Third Edition, Gregg Publishing Company, 1970.

Lloyd, Rowe, Winger, *Typewriting for Colleges*, Third Edition, Gregg Publishing Company, 1970.

Rowe, *College Typing*, Second Edition, H. M. Rowe Company.

Russon and Wanous, *Philosophy and Psychology of Teaching Typewriting*, South-Western Publishing Company.

## VI. BOOKLETS, PERIODICALS, JOURNALS, MAGAZINES AND MONOGRAPHS

### Booklets

*Artistic Typing.* Teaching Aids Exchange.

*Complete Handbook of Typewriter Art.* Artistic Typing Headquarters.

*Electric Typewriting for the Classroom Teacher.* Royal.

*The Expert Simplifies Erasing.* Royal.

*The History of the IBM Electric Typewriter.* IBM.

*How to be an Expert on Carbons and Ribbons.* The Carter's Ink Company.

*How to Punctuate a Business Letter.* Pitman Publishing Company.

*Letter Perfect.* Dictaphone Corporation.

*Letter Placement Guide.* Rowe.

*Secretarial Shortcuts.* IBM.

*The Successful Secretary.* Dartnell Corporation.

*Typewriting News.* South-Western.

*Typewriting Style Manual.* South-Western.

*Typing Do's and Don'ts.* Royal.

*You . . . As a Secretary.* Royal.

### Drills and Timings

The following drills and timings are available from the companies indicated. They are categorized according to area emphasis.

#### *Electric Typing*

*A Short Course in Electric Typing.* IBM.

*Changing Manual Operators to Electric Typing.* IBM

*Electric Keyboard Mastery.* Royal.

*The Key to Relax Typing.* Royal.

*The IBM "Selectric" . . . An Introductory Course.* IBM.

*The Executive Electric Typewriter Program.* IBM

*Practice Exercises for Electric Typewriting.* IBM.

**Typing I**  
**Letters**

*Basic Letter Typing.* South Western

*Numbers and Symbols*

*Statistical Typing* South-Western

*Speed and Accuracy*

*Finger Dexterity Drills.* Royal.

*Typing for Accuracy.* Rowe.

*Faster Typing.* Rowe.

*High School Speed.* Rowe.

*Progressive Typewriting Speed Practice.* Gregg.

*Speed Typing.* South-Western.

*Typewriting Speed Studies.* Gregg.

*Speed and Accuracy Drills.* Rowe.

*Sustained Timed Writings.* Gregg.

*Typewriting Drills for Speed and Accuracy.* Gregg.

*Typing Power Drills.* Gregg.

*Typing Skill Drives.* Gregg.

*Spelling at Your Typewriter.* Gregg.

*Typewriting Timed Writings.* South-Western.

*Timed Writings About Careers.* South-Western.

*Speed Typing.* South-Western.

*Data Processing Information in Timed Writing Copy.* Gibson.

**Technique Improvement**

*Basic Typewriting Drills.* South-Western.

*Basic Typewriting Operations.* South-Western.

*Summary of Typing Techniques.* Rowe.

*Typewriting Techniques and Shortcuts.* South-Western.

*Tabulation Typing.* Gregg.

## VII. FILMS, FILMSTRIPS, TAPES, RECORDS, TRANSPARENCIES, OPAQUE PROJECTIONS, CHARTS AND MODELS

### Films

"Addressing Envelopes." "Advanced Typing: Duplicating and Manuscript." "Basic Typing: Machine Operation." "Building Typing Skill." "Eight Parts of a Business Letter." "Electric Typing Time." "Keys to the Future." "Know Your Typewriter." "Ready to Type." "Right at the Start." "Tips on Typing." "Type Right." "Typewriter in Business." "Typing Techniques." "Using a Carbon Pack." Business Education Films, 5113 16th Avenue, Brooklyn, New York 11204.

"Impressions." "Right at the Typewriter." IBM, Film Activities, Department of Information, 590 Madison Avenue, New York, New York 10022.

"Tricks of the Trade for Typists." "Typing Shortcuts," Parts I, II and III. Teaching Aids Exchange, P. O. Box 1127, Modesto, California 95352.

"Shortcuts in Typing." Education Progress Service, Randolph, Wisconsin 53596.

### Filmstrips

"Better Posture—Better Typing." "Display Typing: Methods and Shortcuts," Parts I and II. "Display Typing: Principles and Patterns." "Forms Typing." "Fundamental Typing Habits." "Getting the Typewriter Ready." Parts I and II. "Letter Typing," Parts I and II. "Manuscript Typing." "Tabulation Typing." Business Education Films, 5113 16th Avenue, Brooklyn, New York 11024.

"The Master, Part I" "The Stencil, Part I." A. B. Dick Products Company, 1030 New Circle Road, Lexington, Kentucky 40305.

### Tapes

(tapes for teaching Gregg typing keyboard course)

*Typing Tapes for Typing Skill Drives.* Gregg.

*20th Century Typewriting Records.* South-Western.

### Records

Homework Practice Records. Dictation Disc Company.

Timing Record with Music. Dictation Disc Company.

Keyboard Drills and Exercises. Gregg.

Typewriting Rhythm Records. Gregg.

*20th Century Typewriting Records.* South-Western.

### Transparencies

Volume 1, "Machine Manipulation." Volume 2, "The Keyboard." Volume 3, "Basic Typewriting Operations." Volume 4, "Special Applications." Four volume set. South-Western.

## Typing I

"Hand-Position Transparencies," Teaching Aids, Inc., Lambert Building, 200 Nieto Avenue, Long Beach, California 90803.

"What Makes a Typewriter Function." "How to Make the Typewriter Work Better for You." "Writing a Letter." "Business Forms." "Typing a Manuscript." "Making Routine Duties Interesting." Series of 91 transparencies. Wespen Audio-Visual Company.

"The Clerk Typist." Series of transparencies. 3M Company.

Series of transparencies correlated with the text. Gregg.

### Charts and Posters

"Behavior-Pattern Cartoons for Typing." "Hand-Position Chart." "Letter Style Chart." "Manuscript Guide Charts." "Typewriter Keyboard Chart." "Typewriter Keyboard Chart." "Typing Technique Cartoons." "Your Stairway to Success . . . With Typing Keys." Teaching Aids, Inc., Lambert Building, 200 Nieto Avenue, Long Beach, California 90803.

"Good Posture Charts." Adjusto Equipment.

"Combined Manual and Electric Keyboard Wall Chart." Royal Business Equipment Manufacturers Association.

"Gregg Typing Wall-chart Instructor-projection Screen." "Picture-Posters for Use with Gregg Typing." Gregg.

"Individual Keyboard Chart." "Keyboard Chart." Rowe.

"Keyboard Wall Chart." "Posture Chart." "Wall Diagramatic Chart." Royal.

"Skill Achievement." Delta Pi Epsilon.

"Typewriting Speed Chart." South-Western.

### Programmed Materials

EDL Typing Homework Series, for use with the EDL Controlled Reader, is available from Learning 400, Inc., 75 Prospect Street, Huntington, New York 11743.

"Centering and Tabulating Practices for Typists." "Manuscript Arrangement for Typists." "Practices in Typing the Business Letter." "Preparing Stencils and Masters." American Book Company, 300 Pike Street, Cincinnati, Ohio 45202.

### Simulated Work Experience

"A Typist's Day in the Office of Ditto, Inc." "What Every Typist Should Know About Copies in Office Work." Ditto, Inc.

"A Secretary's Day in the Office of Monroe International, Inc." Monruse.

"Applied Business Typing." "Brief Typing." "Office Practice for Typists." "Office Typing, Revised." Rowe.

"Applied Office Typewriting." "Medical Typing Practice Text." "Typing Mailable Letters: Practice Projects in Placement, Punctuation, Proofreading and Production." Gregg.

"Typewriting Office Practice." South-Western.



## VIII. EQUIPMENT AND SUPPLIES

### A. Typewriters

1. A machine for each pupil (recommend not over 30 stations in room) with about 5 extra machines
2. Electric typewriters – one-half
3. Lettered keyboards
4. Few machines over 5 years old
5. Number machines and keep a card filed for each machine
6. Have maintenance provided; have regular replacement policy

### B. Tables

1. An L-shaped adjustable desk is preferred. Otherwise adjustable tables about 20" x 40" with open space for storing books.

### C. Chairs

1. An adjustable swivel posture chair

### D. Other equipment

1. Teacher's desk and chair
2. Movable, adjustable demonstration stand with typewriter
3. Chalkboards
4. Bulletin boards
5. Wall charts such as keyboard, finger and posture positions and typewriter parts
6. An interval timer and a stop watch
7. Storage cabinet
8. At least one four-drawer filing cabinet with lock
9. Phonograph and records
10. Letter trays
11. Work table
12. Unabridged dictionary on stand
13. Visitor's chair

## Typing I

14. Sink, soap and towels
15. Tape recorder
16. Overhead projector and screen
17. Ditto machine and stencil duplicator
18. Slide and film projector (available)
19. Controlled reader or tachistoscope

### E. Supplies

1. Textbooks (should not be more than 5 years old) — ideally one for each pupil, but at least one for each machine with several extra
2. Large wall calendar
3. Pencil sharpener
4. Waste basket
5. Scissors
6. Paper cutter
7. Staplers and supplies
8. Dictionaries
9. *20,000 Words* or word finder
10. Copy holders
11. Colored chalk and liner for blackboard
12. Typing paper, letterhead paper, carbon paper, onionskin paper, telegraph blanks and other business forms.
13. Various sizes and kinds of envelopes
14. File folders
15. Typewriter ribbons and empty spools
16. Stencils and master sets
17. Correction fluid
18. Duplicator paper
19. Styli

20. Erasers
21. Razor blades
22. Paper clips, rubber bands, thumb tacks, cello and masking tape
23. Typewriter cleaning supplies

## IX. LAYOUT AND FACILITIES

The typing room should be adjacent to the other business education rooms. It should be one and one-half the size of a standard classroom. It should contain approximately 1,000 to 1,440 square feet and be about 30 x 40 feet. There should be double electric outlets by each desk and a master switch. The room should be acoustically treated. Adequate storage space should be provided including shelves. Chalkboards should be on two walls. Lavatory facilities should be provided. Typing tables should be arranged so that the instructor can walk by each student's desk. There should be black shades to darken the classroom for films.

Try various room arrangements, such as clusters, desks all facing center and circular arrangement.



## TYPING – THIRD SEMESTER

One Semester

Grades 11 or 12

Vocational

First year typing is a prerequisite.

Third semester typing is designed to develop ability in typing for vocational use and in applying these skills to practical office situations. This class builds upon those previously acquired knowledges and skills in the first year of typing in order to refine and prepare students as office typists.

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## I. OBJECTIVES\*

The student will:

- A. develop manipulative skill and techniques in the operation and care of electric typewriters
- B. review and strengthen important related learnings of typing as an index of what should be taught or given early emphasis, such as word division, number guides, spelling, capitalization guides and other elements of technical English
- C. drive for increased speed and accuracy through straight-copy and production writing with periodic checks of skillful use of basic techniques
- D. demonstrate good work habits that are important to success in business activities and to evolve orderly procedures for handling routines
- E. demonstrate consistence in number and symbol typing with an awareness of the necessity for complete accuracy to meet the standards of clerical and automation activities
- F. increase sustained production skill in typing mailable letters on regular and special size stationery; tabulated reports with rulings, grouped data and notes; special communications; letters with tables; and selected business forms; envelopes, carbon copies and enclosures
- G. demonstrate skill in duplicating, including preparation of stencils, masters for spirit duplicators, models for photocopies and multiple copies
- H. compose usable copy directly at the typewriter and achieve alertness through correct-it-as-you type and rough draft activities
- I. erase neatly, crowd and spread letters, align materials and proofread materials
- J. exemplify desirable attitudes, personal resourcefulness, self-reliance, responsibility and self-control that lead to good work performance
- K. effectively organize and type outlines, manuscripts with footnotes, title pages, tables of contents, bibliographies and business report forms.

## II. UNITS--TOPICAL OUTLINE

- A. Introduction or review of electric typing
- B. Improvement of speed with accuracy by intensive drills
- C. Review and strengthen important related learnings of first year typing
- D. Power building in typing business correspondence with a variety of special arrangement problems
- E. Arrangement of tabulated reports in various styles
- F. Use and preparation of selected business forms

\*The minimum acceptable standards should be determined by the individual teacher. Suggested standards are given in Chapter IV of this section.

- G. Development of speed in the typing of numbers and symbols
- H. Composition of manuscripts and letters at the typewriter
- I. Report typing including legal documents and business reports
- J. Mailable letters from both direct dictation and correct-as-you-type letters
- K. Duplicating processes
  - 1. Stencils
  - 2. Master copies for spirit duplicators
  - 3. Multiple carbons
- L. Proofreading and making corrections
- M. Short cuts in office typing
- N. Care of the typewriter
- O. Completion of an office practice set, especially where the third semester is a terminal course

### III. TEACHING METHODS

- A. Correct techniques should be emphasized at all times.
- B. Speed and accuracy should be built by providing opportunity for daily practice.
- C. A speed chart may be posted if it serves to motivate good practice.
- D. Following oral and written instructions should be stressed.
- E. Typewriter dictation should have a planned program to proceed from the simple to the complex by beginning with short phrases and progressing to complete sentences, paragraphs, short letters and eventually to long letters.
- F. Students should be informed that the usage presented in the typewriting class may be one of many acceptable forms. The teacher must provide for adaptability in the class as would be found in the business office. Students could supply a collection of actual business letters to identify different ways of typing business letters.
- G. Desirable office traits such as business ethics, office deportment, personality and cooperative attitudes may be developed by classroom situations, guest speakers and self-evaluation.
- H. Proofreading can be taught several ways:
  - 1. as a class project
  - 2. by the paper bail method
  - 3. by two students
  - 4. by correcting as you type.

## Typing--Third Semester

- I. Showing films and filmstrips can be a good motivational device if the presentation is planned, organized and a follow-through for the students to practice what the film has presented. After seeing a film, the students should compose a typewritten evaluation.
- J. A spirit duplicator project can be organized as a class project with each student preparing a master and completing the operation of a page or pages. This can be an office manual, holiday recipe booklet or a poem collection. All copies are collated into booklet form.
- K. Office practice sets can be used the last six to eight weeks, along with straight copy and production timings once a week.
- L. Simulated business office typing by using material listed under *Simulated Work Experience*, Chapter VII, Typing I.
- M. If the greatest good is to come to each student in typewriting, individual differences should be recognized and adequate adjustments made. Students, not classes, should be taught.

Individual differences may be met by:

1. the contract plan – units of work of varying lengths and difficulty, minimum requirements for students of limited ability and maximum requirements for the above average students
2. bonus typing – additional drill and problem typing for bonus typing
3. use of audio-visual aids (EDL machine, records) – if used at the right time, are of great value to the slow learner
4. review – for the slow learner
5. extra work – the above-average student may have the privilege of working for himself on assignments in other subjects
6. practical office jobs – cutting stencils, making master copies for the ditto machine and typing tests and letters for faculty members will provide practical office jobs for the above-average students.

## IV. EVALUATION, STANDARDS OF PERFORMANCE, TESTING AND GRADING

- A. It is difficult to set standards that can be adapted to all typing classes and situations. It is necessary, however, to set up goals that will indicate the minimum degree of success needed to pass the course.

Grading scales are given in the teacher's manual which accompanies the typewriting textbook. This scale can be modified to meet the needs of the school. The scale should be exacting enough at the top to identify superior typists and generous enough at the lower end of the scale to recognize and encourage those with limited skill.

The typing grade should not be based on a single factor such as straight copy speed and accuracy, but should be a composite of the student's total typewriting ability, techniques and work habits, scores on timed writings, objective checkups and production typing power.



B. Suggested guides for evaluation and grading

1. In production work mailability should be the primary basis on which material is accepted or rejected.
2. The experienced teacher can ascertain from the performance of the entire class what can reasonably be expected at various points along the way. Students preparing to go on the job should be able to produce at least 2 mailable letters (150-180 words in length) in 20 minutes.
3. Since a high degree of accuracy is essential, a three-to-five error limit on five-minute timed writings is suggested. The teacher will have to determine from class progress whether or not these standards would have to be changed.

Grade	GWAM	Errors
A	65 - up	3
B	59 - 64	3
C	49 - 58	5
D	40 - 48	5

4. Mailability grading by points

M = 4 points, M = 3 points, M- = 2 points, NM = 1 points, INC = -2 points

M A **Mailable** paper is perfect.

M A **Mailable** paper is one that is correct except placement is slightly off and there are unnoticeable erasures. See Chapter IV of Shorthand and Transcription.

M A **Mailable** paper is one that is correct except placement could be better and errors could be corrected. If possible, the student should make these corrections.

NM A **Nonmailable** paper is one that contains careless erasures, improper word division, or a serious error that could not be corrected.

INC An **Incomplete** paper is one that is not turned in or is not finished.

V. TEXTBOOKS AND TEXTBOOK REFERENCES

Textbooks

Lessenberry, Crawford, Erickson. *20th Century Typewriting*. Ninth Edition, advanced (vocational) course, parts 3 and 4 of the complete course. Cincinnati, South-Western, 1967. Workbook, Achievement Tests, Placement Tests and Manual.

Reigner, Rygiel. *Rowe Typing*. Fifth Edition, Chicago: The H. M. Rowe Company, 1962.

Rowe, Lloyd, Winger. *Gregg Typing, 191 Series, Book 2, Vocational Office Typing*,. Second Edition, New York: McGraw-Hill, 1967, Learning Guides and Working Papers for Book Two – Office Production Typing, Parts 1-6.

## Typing--Third Semester

### Practice Sets

Agnew, Atkinson. *Typewriting Office Practice*. Fourth Edition, Cincinnati: South-Western, 1967.

Anderson, Porter. *130 Basic Typing Jobs*. Prentice-Hall, 1960.

Frisch, Handal. *Applied Office Typing*. Third Edition, New York: McGraw-Hill, 1969.

### Other Textbooks and Reference Material

Altholz, Gertrud. *Modern Typewriting Practice*. Third Edition, New York: Pitman, 1962.

Bell, Ruth. *Speed Writing*. South-Western, Third Edition.

Bowman, Wallace. *Business Letter Typing*, South-Western, 1957.

Brendel and Leffingwell. *English Usage Drills and Exercises*. Programmed for the Typewriter, New York: McGraw-Hill, 1968.

Brendel and Near. *Spelling Drills and Exercises*. Programmed for the Typewriter, New York: McGraw-Hill, 1964.

Brendel and Near. *Punctuation Drills and Exercises*. Programmed for the Typewriter, 1970.

Connelly and Porter. *Typing Speed Building*. Prentice-Hall, 1962.

Fries, Albert. *Timed Writings About Careers*. South-Western, 1968.

Fries and Nanassy. *Business Timed Writings*. Mc-Graw-Hill, 1963.

Grubbs and White. *Sustained Timed Writings*. Mc-Graw-Hill, 1963.

Grubbs and Weaver. *Typing Improvement Practice*. Electric Edition, McGraw-Hill, 1970.

Lilies and others. *Typing Mailable Letters: Practice Projects in Placement, Punctuation, Proofreading and Production*. McGraw-Hill, 1960.

Lloyd and others. *Typing Power Drills*. McGraw-Hill, 1965.

Lloyd and others. *Typing Skill Drives*. McGraw-Hill, 1960.

MacClain, Fenton, Dame. *Typewriting Techniques and Short Cuts*. Third Edition, South-Western, 1961.

Mount and Hansen. *Progressive Typewriting Speed Practice*. McGraw-Hill, 1961.

Rowe and Etier. *Typewriting Drills for Speed and Accuracy*. Third Edition, McGraw-Hill, 1966.

Tidwell and Bell. *Tested Timed Writings*. Prentice-Hall, 1960.

Thompson, Dr. James. *101 Typewriting Timed Writings*. Second Edition, South-Western, 1966.

Wanous, S. J., and Wanous, E. W. *Basic Typewriting Drills*. Fourth Edition, South-Western, 1966.

**Books on Teaching Typing**

Lamb, Marion. *Electric Typing*. McGraw-Hill, 1962.

Lamb, Marion. *Your First Year of Teaching Typewriting*. South-Western, 1959.

Russon, Allien, Wanous. *Philosophy and Psychology of Teaching Typewriting*. South-Western, 1960.

**Student References**

Anderson, Ruth and others. *Word Finder* 1960.

Doris and Miller. *Complete Secretary's Handbook*. Prentice-Hall, 1963.

Friedman, Shorwood, Crossman. *Handbook for Typists*. Pitman, 1962.

Gavin, Hutchinson. *Reference Manual for Stenographers and Typists*. Third Edition, McGraw-Hill, 1961.

Houss and Koebele. *Reference Manual for Office Personnel*. Fifth Edition, South-Western, 1970.

Leslie, Louis. *20,000 Words, Spelled and Divided*. McGraw-Hill, 1971.

Russon, Allien. *Business Behavior*. Third Edition, South-Western, 1964.

Silverthorn, J. E. *Word Division Manual*. South-Western.

**VI. BOOKLETS, PERIODICALS, JOURNALS, MAGAZINES AND MONOGRAPHS**

**Booklets**

*Electric Keyboard Mastery. Electric Typing Methods. Typing Do's and Don'ts*. Royal Typewriter Company, Inc., 150 Park Avenue, Hartford, Connecticut 06106.

*How to be an Expert on Carbons and Ribbons*. Free. Carter's Ink Company, Cambridge, Massachusetts 02412.

*How to Use the Ditto Duplicator*. Ditto, Inc., 6856 McCormick Road, Chicago, Illinois 60645.

*The Seven Keys to Better and Faster Typing*. Government Printing Office, Washington, D. C. 20402.

**Periodicals, Journals and Magazines**

*Balance Sheet*. (free) South-Western Publishing Company, 634 Broadway, Cincinnati, Ohio.

*Business Education World*.(free) New York: McGraw-Hill Book Company, Inc.

*National Business Education Quarterly*. National Business Education Association, 1201 Sixteenth Street, N.W., Washington D. C. 20036.

*The Rowe Budge*. (free) Baltimore: The H. M. Rowe Company.

## Typing--Third Semester

*Today's Secretary.* Gregg Division, McGraw-Hill Book Company, 330 West 42nd Street, New York, New York 10036.

*Typewriting News.* (free) South-Western Publishing Company, Cincinnati.

*UBEA Forum.* UBEA, 1201 16th Street N.W., Washington, D. C.

### Monographs

*Practices and Preferences in Teaching Typewriting.* No. 117, 1967. *Production Typing*, No. 97, 1960. *Visual Aids for Business and Economic Education*, No. 92, 1959. Free. South-Western Publishing Company, Cincinnati.

## VII. FILMS, FILMSTRIPS, TAPES, RECORDS, TRANSPARENCIES, OPAQUE PROJECTIONS, CHARTS AND MODELS

(Refer to this section under Typing I and Clerical and Secretarial Office Practice for additional teaching material.)

### Films

"Advanced Typing: Duplicating and Manuscript," 25 min. Method of making masters for duplicating machine use, correcting mistakes on a stencil, use of electromatic hectograph machine and means of making symbols not on the typewriter. (U.S. Navy) Business Education Films, 4607 16th Avenue, Brooklyn, New York 11204.

"Advanced Typing: Shortcuts," 33 min. Importance of good posture and proper arrangement of equipment. How to type columns of figures, use carbons, make neat erasures, type cards, envelopes, labels and draw lines. Business Education Films, 4607 16th Avenue, Brooklyn, New York 11204.

"Breaking the Production Barrier," (color) 14 min. About the new power typewriter. Free loan basis. IBM

"Building Typing Skill," (color) 11 min. Speed is achieved through practice aimed at four goals: (1) improving one's attitude toward typing; (2) developing good typing form; (3) conditioning one's muscle for typing; and (4) improving one's basic typing patterns. Montana State Audiovisual Library.

"Electric Typing Time," (color) 20 min. Shows the use of electric typewriters in offices and classrooms. Covers such points as applications and operative features of the typewriter, posture, learning to type on electrics, position of hands and fingers as well as touch and typing of numbers. Stresses benefits derived for the typist and the employer. (IBM) Business Education Films.

"Keys to the Future," (color) 30 min. Shows that a knowledge of typing can improve grades, expand interest in outside activities and can provide after-school income. Outlines careers where typing is an asset: the professions, newspaper and literary work, accountancy, law, teaching and executive positions. Free loan basis from Association Films, Inc. (Royal)

"Right at the Typewriter," (black and white) 29 min. Gives some helpful hints and tips to improve one's skill in using electric typewriters. 1962. Free loan IBM.

"Typing Skills: Daily Job Techniques," (color) 13 min. How a typist anticipates a variety of jobs and plans each individual job. Montana State Audiovisual Library.

"The Selectric," 6 min. Available on a free-loan basis from IBM.

"Ten copies, Please," 22 min. History of handwriting in the past as compared with the electric typewriter of today. Business Education Films.

"Tips on Typing," 21 min. Demonstration on how to improve speed and efficiency, shows shortcuts for special jobs and machine care. (Underwood) Business Education Films.

"Typewriter in Business," 21 min. Free loan basis. Shows the various applications and uses of typewriters and typewriter attachments. Makes suggestions for typing business correspondence, forms, statistics, off-set plates, lists and special jobs. (Remington-Rand)

"Typing Techniques," 31 min. Illustrates a number of common errors made by typists and corrected in this amusing film—covering proper posture, care of typewriter, etc. Business Education Films.

"Using a Carbon Pack," 12 min. Demonstrates many little-known points for short-cuts to rapid manifolding and carbon uses while typing. Business Education Films.

#### ADDRESSES

Business Education Films  
4607 16th Avenue  
Brooklyn, New York 11204

Association Films, Inc.  
347 Madison Avenue  
New York, New York 10017

IBM  
590 Madison Avenue  
New York, New York 10022

Encyclopedia Britannica Films, Inc.  
1150 Wilmette Avenue  
Wilmette, Illinois 60091

Instructional Systems Associates  
P. O. Box 1379  
Wichita, Kansas 67201

Remington Rand  
Division of Sperry Rand Corporation  
315 Fourth Avenue  
New York, New York 10010

#### Filmstrips

Electric Typewriter Skill Development Set. (EDL) Text-Film Division McGraw-Hill.

Forms Typing, 12 min., rental \$2.50. Reviews the purpose of using printed and duplicated forms and the procedures by which the typist inserts data on them. Shows how a form is developed and the kind of story that can be read from the information on it. Business Education Films.

"Letter Typing, Part I," (color) 12 min., rental \$2.50. A letter-typing clinic which discusses typing the heading, inside address, salutation, the body of the letter, the complimentary close, the signer's identification reference initials and enclosure notes. Business Education Films.

"Letter Typing, Part II" (12 minutes, color, rental, \$2.50). Discusses the different letter styles and letter placement for long, short, and average length letters. Business Education Films.

"Manuscript Typing," (color) 12 min., rental \$2.50. Gives an introduction to correct form and arrangement and discusses variations that are permitted. Business Education Films.

"Shortcuts and Aids for the Office Worker," (color). A filmstrip accompanied by a student projects manual and 33 1/3 rpm records. Instructional Systems Associates.

## Typing--Third Semester

### Transparencies

Transparencies are available from the following distributors. Write for current catalog and price list.

General Aniline & Film Corporation  
140 West 51 Street  
New York, New York 10020

National Educational Visuals  
Company, Inc.  
West Street  
New Port, New York 13416

Wespen Audio-Visual Company  
Box 188  
Hawthorn, Pennsylvania 16230

McGraw-Hill Book Company  
Gregg Division  
330 West 42nd Street  
New York, New York 10036

South-Western Publishing Company  
634 Broadway  
Cincinnati, Ohio 45227

Visual Products Division  
3M Company  
4835 Para Drive  
Cincinnati, Ohio 45237

## VIII. EQUIPMENT AND SUPPLIES

- A. Refer to this section under Typing I and Clerical and Secretarial Office Practice since the same equipment and supplies would be used.
- B. This class is best held in the Clerical and Secretarial Office Practice room. Electric typewriters are necessary for Typing—Third Semester and all the necessary supplies and equipment would be in this classroom.
- C. An additional file cabinet would be necessary for the teacher with one file drawer used by the students for storage.

## IX. LAYOUT AND FACILITIES

- A. Layout and facilities for this class would be the same as for the Clerical and Secretarial Office Practice room.
- B. There should be double electric outlets by each desk for the electric typewriters. A master switch with a key should be required.

## SHORTHAND I

One year

Grades 11 or 12

Vocational

Primary emphasis is on the presentation and practice of the principles and theory as a foundation for the study of advanced dictation and transcription. Daily homework assignments are given. The beginning student should be prepared to spend a minimum of one hour each day on homework preparation for at least the first six to nine weeks. Students should transcribe with typewriters in school during the second semester. Shorthand should be taken by those who have had, or are taking, typewriting; who are average or above in scholarship, particularly in the language arts; and who possess personal qualities for success in an office.

## SHORTHAND II AND TRANSCRIPTION

One year

Grade 12

Vocational

The shorthand vocabulary and writing proficiency are extended through a review of shorthand theory and a continued stress on spelling, syllabication, punctuation, grammar and preferred typewriting styles in shorthand transcription for production. The vocational goal is to build speed and accuracy in taking dictation and transcribing mailable copy. Students who enroll in the course, which is frequently combined with Secretarial Office Practice, should have done at least average work in first-year shorthand and typing.

## SHORTHAND I

## SHORTHAND II AND TRANSCRIPTION

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## Shorthand I & II

### I. OBJECTIVES\* – Shorthand I

The student will:

- A. demonstrate the ability to apply the principles of Gregg shorthand
- B. read practiced material from the textbook shorthand plates for two minutes with two errors allowed at the rate of 120 words a minute
- C. automatize commonly used words and phrases
- D. write shorthand fluently
- E. construct and transcribe outlines for unfamiliar words
- F. build sustained writing skill
- G. transcribe notes accurately and intelligently at a reasonable rate
- H. apply the principles of English grammar, capitalization, punctuation, spelling, word division and correct use of words
- I. proofread transcripts accurately
- J. build a general and business vocabulary
- K. develop desirable traits and attitudes required for success in business and personal relationships
- L. follow directions and develop desirable work habits.

### OBJECTIVES\* – Shorthand II

The student will:

- A. continue to improve performance based on objectives
- B. produce mailable transcripts at an acceptable speed for vocational use
- C. demonstrate acceptable secretarial practices.

### II. UNITS—TOPICAL OUTLINE

- A. First Semester
  - 1. Lessons 1-24
    - a. Use *Instructor's Handbook* for procedures in presentation
    - b. Beginning instruction with the reading approach, writing approach, or early-new-matter dictation approach is left to the discretion of the teacher

\*The minimum acceptable standards should be determined by the individual teacher. Suggested standards are given in Chapter IV of this section.



- c. No formal evaluation should be done during Lesson 1–6. Formal evaluation should be kept to a minimum and should measure the development of the learner’s shorthand reading and writing skill rather than his ability to state rules or construct outlines identical to the shorthand plates in the text.
  - d. Dictation should begin as soon as writing begins. See *Instructor’s Handbook*.
  - e. Begin transcription from shorthand plates (preferably at the typewriter).
2. Lessons 25–48
    - a. The quality of practice material increases as the learner’s skill develops.
    - b. Emphasis should begin to shift from plate reading to the reading and transcribing of the learner’s own shorthand notes.
    - c. The amount of practice dictation should be increased and students should be urged to rely less on open books during dictation.
  3. Lesson 49–56
    - a. The practice material reinforces the principles presented in the chapters of Part I.
    - b. Build dictation to sustained periods of two minutes.
    - c. Continue dictation from practiced material; discourage use of open books.
  4. Lessons 57–70
    - a. Practice material concentrates on brief forms, phrases and joined word beginnings and endings.
    - b. Textbooks should be closed during dictation of practiced material.
    - c. New material dictation, liberally previewed (10-15 percent of total words), should have been introduced by this time.
- B. Second Semester
1. Lessons 1–30
    - a. Use *Instructor’s Handbook* for procedures in presentation.
    - b. Emphasize dictation of new material.
    - c. Use lesson-correlated dictation material in the *Instructor’s Handbook*.
    - d. Build dictation of new material to sustained periods of three minutes.
  2. Lessons 31-60
    - a. Continue to emphasize dictation of new material.

## Shorthand I & II

- b. Sustained takes of dictated new material may be lengthened to five minutes.
  - c. Typewritten transcription is strongly recommended.
  - d. Introduce mailable letters. (See *Elements in the Mailability of Letters*, Chapter 4 of this section.)
3. Lessons 61–80
- a. Continue to emphasize dictation of new material, sustained dictation for three to five minutes, transcription skill and mailable letters.
- C. Third and Fourth Semesters
1. Improvement of shorthand skills
    - a. Review and mastery of shorthand theory, phrases and brief forms and derivatives
    - b. Development of shorthand vocabulary
    - c. Development of English vocabulary
    - d. Development of ability to read homework assignments from “cold” notes at sight. It is important to have the student insert punctuation marks when reading aloud.
    - e. Building pretranscription skill through emphasis on English fundamentals such as spelling, grammar, sentence structure, word usage, punctuation, word division and capitalization
    - f. Building sustained speed through dictation of practiced matter and previewed dictation of new matter as it becomes progressively more difficult
  2. Improvement of transcription
    - a. Transcription from book plates as an introduction to transcription
    - b. Transcription from the student’s shorthand notes
    - c. Typing speed drills to include straight copy and drills from shorthand notes
    - d. Efficient use of equipment and supplies, including the typewriter, shorthand notebook, pens, letterheads, multiple carbons, envelopes, eraser, dictionary, word-division book and stenographer’s reference manual
    - e. Proofreading
    - f. Office-style dictation from instructor, school staff members, businessmen and community visitors to be transcribed
    - g. Transcription from notes taken in dictation of new matter, which is given for longer periods of time and becomes progressively more difficult

3. Preparation for employment-oriented tests (see Office Procedures guidelines for sources)
  - a. State Joint Merit Examination
  - b. Federal Civil Service Examination for typists and stenographers
  - c. Local business employment tests

### III. TEACHING METHODS – Shorthand

There are three generally accepted methods of teaching shorthand, two of which originated with the Gregg textbooks: the “Basic Method” and the “Functional Method.” *Gregg Shorthand, Diamond Jubilee Series*, has available an *Instructor’s Handbook* for each method to accompany the first semester Gregg shorthand textbook. In the “Functional Method” text, the key to the shorthand plates is included at the back of the book for that section covering theory presentation. The *Instructor’s Handbook* contains the key for the remaining review lessons. For the “Basic Method,” the key is a separate *Student’s Transcript* booklet.

Each of these two methods is thoroughly described in the *Instructor’s Handbook*, together with suggested presentation. Both methods are explained and compared in *Methods of Teaching Business Subjects*, Third Edition, by Tonne, Popham and Freeman.

Briefly, the specific characteristics of each are described as follows.

#### A. Basic Method

1. Basic Method uses the “science-type” method of teaching, or the use of verbalized generalizations in which the student verbalizes and knows the rules that match an illustration.
2. Writing is introduced earlier than with the “Functional Method” and provides for writing the first day if the teacher so desires.
3. Drills are used to call attention to distinguishing characteristics of good shorthand and as a form of remedial teaching.

#### B. Functional Method

1. “Functional Method” uses the language-arts type of teaching as a reading-writing approach rather than isolated work lists.
2. Reading is basic to the “Functional Method,” and *Methods of Teaching Business Subjects* suggests that writing does not start until after twenty lessons.
3. This method is directed toward automatization of correct shorthand without the learning of verbalized rules, or even knowing there are rules.

The third method, called the “Early-New-Matter Approach” has been developed by Allien R. Russon of the University of Utah and is described in South-Western Publishing Company’s Monograph No. 119. This monograph relates the advantages and disadvantages of the Reading Approach and the Writing Approach.

## Shorthand I & II

The Early-New-Matter Approach includes writing very early in the form of tracing from the plates in the textbook for the first six weeks and reading aloud while writing so that three senses are being used in the learning process, rather than just one while reading or just one while writing.

Russon's Early-New-Matter Approach offers suggestions and methods that could be used with any method for variety.

The individual teacher must make a selection of which method to use. Some arguments can be offered in support of each method, and none can be said to be "right" or "wrong." The teacher may wish to use a combination of methods; for example, using the Functional Method but introducing writing at the end of Lesson 6, as suggested in the *Instructor's Handbook* for the Basic Method, rather than after several weeks.

### C. Standard Methods

Certain standardized, or generally accepted, methods are characteristic of all methods.

1. Reading and writing should be done in context rather than from isolated word lists.
2. Chalkboard or overhead projector should be used extensively by the teacher for writing shorthand, as it is essential for the student to see the direction and movement used to write the outlines. The size of the outline written on the chalkboard is not important, but stress on formation and fluency is important.
3. Homework is essentially for reading and writing practice.
4. Dictation should take a considerable amount of class time because often students cannot get this kind of practice outside of class.
5. Dictation, which begins as soon as writing starts, regardless of method used, should be given at varied speeds—rapid dictation to encourage fast writing and slower dictation to encourage quality outlines.
6. New-matter dictation should follow completion of theory unless the Early-New-Matter Approach is used. (See the evaluation section of this guideline.)
7. More attention should be given to rapid writing than to the exactness of the outline.
8. With any method, correct outlines of dictated practiced material are available to the writer until the teacher decides when to require dictation without reliance on the plates. (See evaluation.)
9. Punctuation and spelling should be stressed throughout the reading and writing so that it does not suddenly constitute an added demand when transcription begins.

### TEACHING METHODS -- Typewriter Transcription

- A. Transcription at the typewriter requires correct training and practice. Problems involved in transcription should gradually increase in difficulty.
- B. *The Instructor's Handbook for Gregg Dictation* contains detailed material on the teaching of transcription. A three-step plan for typewritten transcripts is presented. Probably not more than five days should be spent on each of steps 1 and 2 below. In brief, the steps are:

1. Transcribe from familiar shorthand plates. Detailed machine adjustments are given. Proper techniques are demonstrated. No erasing is done. Students use letterhead paper, if possible, and repeat the letter until everyone has finished.
  2. Dictate a letter from the shorthand text. The letter has been practiced for homework.
  3. Dictate an unfamiliar letter for transcription.
- C. Some procedures in developing machine transcription are:
1. begin with a short letter from the shorthand plate in the text
  2. review letter style, including margins and vertical placement
  3. place on the board inside address and signature lines
  4. demonstrate the correct transcribing techniques
    - a. indicate correct arrangement of materials while transcribing
    - b. eyes on copy, carriage moving rhythmically
    - c. stress awareness of correct spelling, word division, punctuation, capitalization and word usage
    - d. proofread while copy is still in the machine
  5. write on the board in shorthand the phrases or words difficult to type. Have students type these words and phrases for about ten seconds each
  6. next, students type from shorthand plates. As each student finishes, she removes transcript and begins again until everyone is through with one transcript or until time is called
  7. repeat on succeeding days, adding the erasing of errors to the transcription technique
  8. as the class progresses from shorthand plates to homework notes to letters dictated from the plates, students observe the amount of space their notes take in their notebooks. Explain how to judge letter length from shorthand notes
  9. begin transcription of practiced dictation materials when students demonstrate satisfactory progress in transcribing homework material
  10. before new-material dictation is begun, discuss and/or drill upon the punctuation used in the letters
  11. dictate ten to twenty words a minute below the students' usual shorthand dictation rate
  12. select letters to be dictated for transcription which contain no unfamiliar punctuation
  13. gradually increase letter length and transcription difficulty
  14. continue emphasis on letter placement, correction of errors, proofreading, spelling, word division, commonly confused words, capitalization and punctuation

## Shorthand I & II

15. transcription skills to be developed in the first year of shorthand, providing transcription at the typewriter is taught, include:
  - a. the ability to transcribe short, medium and long letters
  - b. one carbon copy
16. the terminal transcription skills include:
  - a. the ability to transcribe material containing fairly difficult vocabulary
  - b. the ability to transcribe short, medium, long and two-page letters in a variety of styles
  - c. the ability to transcribe materials with multiple carbons
  - d. use of office memoranda and other business reports.

## IV. EVALUATION, STANDARDS OF PERFORMANCE, TESTING AND GRADING

### A. Standards of Performance

1. To take dictation of letters ranging from 60 to 120 words per minute and to transcribe them into mailable form. (Short II – 80 to 160 wpm )
2. To take three minutes or five minutes of dictation at 80 to 120 wpm and transcribe with 95 percent accuracy.
3. To meet acceptable business standards of personal traits and attitudes.

### B. Evaluation and Grading

In a skill subject, emphasis should be placed on two kinds of measurement: measurement of progress in the development of the skill and measurement in terms of terminal skill achievement. Each day's work in the beginning and immediate stages should be a measurement of growth and progress in using the skill. Daily work (which includes reading, writing and transcribing with the related areas of English grammar, spelling and punctuation) should represent a form of continual measurement and evaluation.

First semester daily work covers the following areas:

1. daily homework of reading and writing shorthand, and transcribing homework in class
2. beginning weeks (about weeks 1 to 8) two-minute or three-minute transcription quizzes from practiced plate material in class; grading scale may be raised or lowered to meet the needs of students and may or may not include grading of spelling.

## Suggested Grading Scale

Timed Longhand Transcriptions				
Lessons	A	B	C	D
1-6	17	15-16	9-14	7-8 CWPM*
7-12	same			
13-18	20	17-19	10-16	8-9
19-24	21	18-20	11-17	8-10
25-30	22	19-21	12-18	9-11
31-36	23	20-22	13-19	10-12
37-42	24	21-23	14-20	11-13
43-48	25	22-24	15-21	11-14

\*Correct words per minute: Total words minus errors divided by time.

After approximately 8 weeks, 1 or 2 minutes of dictation from practiced plates with books open, transcribed with 95 percent accuracy.

After 12-16 weeks, 1 minute or 2 minutes of dictation from practiced plate material, without book, transcribed with 95 percent accuracy.

Note: Introduction of new material may be made at any appropriate time during the first semester.

3. Reading rates-END OF FIRST SEMESTER-times for a half-minute or one minute from written homework.

Suggested grading scale:

120 wpm	- A
100	- B
80	- C
60	- D

4. Spelling and theory quizzes may be given.
5. Brief forms must be automatized. It would not seem unrealistic to insist that these be learned approaching 100 percent accuracy. (Minimum acceptable: 90-95 percent)
6. Attitudes - A subjective matter which may be considered in final grade.

Second semester daily work covers the following areas:

1. daily homework of reading and writing shorthand, and dictation if possible; transcribing homework in class

## Shorthand I & II

2. three or 5 minutes of dictation (previewed and unpreviewed) transcribed with 95 percent accuracy.

Suggested grading scale at end of second semester:

### Dictation speed

- 100 - A
- 90 - B
- 80 - C +
- 70 - C
- 60 - D

3. transcription of short, simple mailable letters dictated at speeds within the accurate speed range of most of the students, usually within the lower limits of the above grading scale; grade on **mailability**--nothing less
4. reading rates--END OF SECOND SEMESTER--timed at a half-minute or one minute from written homework.

Suggested grading scale:

- 180 wpm - A
- 160 - B
- 140 - C
- 120 - D

5. spelling and theory quizzes
6. brief forms - approaching 100 percent accuracy
7. attitudes - subjective; may be considered in final grade.

Third semester daily work covers the following areas:

1. daily homework of reading and writing shorthand, and dictation if possible
2. three minutes or five minutes of dictation transcribed with 95 percent accuracy.

Suggested grading scale:

### Dictation speed

- | 5 Min   | 3 Min.  |
|---------|---------|
| 120 - A | 130 - A |
| 100 - B | 110 - B |
| 80 - C  | 90 - C  |

3. transcription of mailable letter as follows
  - a. Gregg Awards Set

- 3 - A
- 2 - B
- 1 - C



- b. transcription period of 20 to 60 minutes for letters dictated at speeds within the accurate range of most of the students, usually within the lower limits of the Dictation Speed grading scale above transcribed in mailable form. Both **number of mailable letters** and **transcription rate** should be included in graded score. The number of letters dictated will depend on the time allowed for transcribing.

New material, consisting of letters varying in length, is dictated to be transcribed according to office standards for mailability. Two grades are given, one based on the number of "mailable" letters completed in the time allowed and the other based on the rate of transcription.

Dictation      80 wpm  
Suggested transcribing rate

- 26 - A
- 23 - B
- 19 - C
- 16 - D

- 4. reading rates--END OF THIRD SEMESTER--timed at a half-minute or one minute from written homework

Suggested Grading Scale:

- 200 wpm - A
- 180      - B
- 160      - C

- 5. spelling and theory quizzes
- 6. brief forms - approaching 100 percent accuracy
- 7. attitudes - subjective; may be considered in final grade

Fourth semester daily work covers the following areas:

- 1. daily homework - reading and writing shorthand, and dictation if possible
- 2. three minutes or five minutes of dictation transcribed with 95 percent accuracy

Suggested grading scale:

Dictation Speed

- |               |               |
|---------------|---------------|
| <b>5 Min.</b> | <b>3 Min.</b> |
| 130 - A       | 140 - A       |
| 110 - B       | 120 - B       |
| 90 - C        | 100 - C       |

- 3. transcription of mailable letters

a. Gregg Awards Set

- 4 - A
- 3 - B
- 2 - C

## Shorthand I & II

- b. Transcription period of 20 to 60 minutes as in third semester, with more or longer letters in less time.

At the end of the year, when dictation is given at 80-100 words per minute for a group of letters comprising a total dictation of 800-1,000 words, the learner should transcribe at the rate of 20-25 wpm.

Grade only mailable letters but include word count of unfinished letters that are without error. Also include in word count, allowance for date (3 words), inside address (15 words), and typed signature and closing notations (5 words). Divide total word count by minutes allowed for transcription. Example: 5 letters of 150 words each = 750 words transcribed; divided by 25 minutes allowed = 30 wpm.

Suggested transcribing rate:

30 wpm	- A
27	- B
24	- C
21	- D

4. reading rates--END OF FOURTH SEMESTER--timed for a half-minute or one minute from written homework

Suggested grading scale:

220 wpm	- A
200	- B
180	- C

5. spelling and theory quizzes
6. brief forms - approaching 100 percent accuracy
7. attitudes, including attendance, dependability, neatness, cooperativeness, etc. - subjective; may be considered in final grade.

## ELEMENTS IN THE MAILABILITY OF LETTERS

### 1. General Appearance

Good margins

Regular type impressions resulting from good rhythm

Good (or no) erasures

No fingerprints, smudges or other marks on the paper

No strikeouts

### 2. Spelling

A single misspelled word, if not corrected, will make the finest letter unmailable; therefore, be sure of your spelling.

### 3. Names and figures

Special attention should be given to the inside address. People do not like to have their names misspelled. Be sure that you are familiar with the names used in the body of the letter. You are justified in asking your employer about unfamiliar names. A single error in a figure will make the letter unmailable.

### 4. Punctuation

Although a letter is still mailable when the punctuation does not always live up to the best authority, any punctuation that changes or does not make sufficiently clear the intent of the dictator makes the letter unmailable.

### 5. English

Any violation of well-established grammatical principles makes your letter unmailable. The fact that dictator made a slip when dictating the letter does not permit you to repeat the error.

### 6. Context

Most employers allow a certain amount of freedom in transcribing dictation. In no event, however, are you justified in changing his meaning.

### 7. Word Division

Any major violation of word division rules will render your letter unmailable.

### 8. Capitalization

The more important and generally accepted rules in capitalization must be observed.

Note: Remember that many of these errors can be corrected easily. If corrections are made, the letter is often mailable and does not have to be rewritten.

### CHART GIVING DICTATION RATES

Most of the dictation material found in texts and dictation books is counted in groups of 20 standard words. Following is a table showing a cumulative count of seconds for dictation 20-word groups. The table covers two minutes of dictating, but may be used for any length take.

		WORDS PER MINUTE						
		70	90	110	130	140	150	
SECONDS ELAPSED	17		13	11	9	8	8	
	34		26	22	18	17	16	
	51		40	33	27	25	24	
	8		53	44	37	34	32	
	25		6	55	46	42	40	
	42		20	6	55	51	48	
	60		33	17	4	60	56	
				47	28	14	8	4
				60	39	23	17	12
					50	32	25	20
					60	41	34	28
						51	42	36
						60	51	44
							60	52
								60

Repeat cycle for "takes" of longer than two minutes.

#### MOST COMMONLY USED DICTATION RATES:

40 wpm in 30 seconds	80 wpm in 15 seconds
50                    25	100                    12
60                    20	120                    10

### CONVERSION TABLE FOR DICTATION SPEEDS

#### Words Per Minute\*

Groups of 35	70	87.5	105	122.5	140	137.5	175	187.5	210				
Groups of 30	60	75.0	90	105.0	120	135.0	150	165.0	180	195.0	210		
Groups of 25	50	62.5	75	87.5	100	112.5	125	137.5	150	162.5	175	187.5	200
Groups of 20	40	50.0	60	70.0	80	90.0	100	110.0	120	130.0	140	150.0	160
Groups of 15	30	37.5	45	52.5	60	67.5	75	82.5	90	97.5	105	112.5	120

#### Time Intervals in Seconds

30	24	20	17	15	13	12	11	10	9	8	8	7
60	48	40	34	30	26	24	22	20	18	17	16	15
30	12	60	51	45	40	36	33	30	27	25	24	22
60	36	20	08	60	53	48	44	40	37	34	32	30
	60	40	25	15	06	60	55	50	46	42	40	37
		60	42	30	20	12	06	60	55	51	48	45
			60	45	33	24	17	10	04	60	56	52
				60	47	36	28	20	14	08	04	60
					60	48	39	30	23	17	12	07
						60	50	40	32	25	20	15
							60	50	41	34	28	22
								60	51	42	36	30
									60	51	44	37
										60	52	45
											60	52
												60

\*Shorthand materials are counted on the basis of syllabic intensity (1.4 syllables for each word, or 28 syllables for 20 words).

**EXAMPLE:** To dictate at 70 words a minute material counted in groups of 20, place your finger on the line that reads "Groups of 20." Run your finger along that line until you reach 70. Drop down to the first figure below the rule, which is 17. To dictate at 70 words a minute material counted in groups of 20 standard words, dictate each group in 17 seconds. The figures below 17 indicate the point on the watch where the second hand should be at the end of each group of 20 words. These time indications have been carried through the first two minutes.

## V. TEXTBOOK AND TEXTBOOK REFERENCES

### Texts – Semester 1

Gregg, Leslie, Zoubek. *Gregg Shorthand, DJ Series*. Second Edition, McGraw-Hill Book Company, 1971.

Hosler and others. *Programmed Gregg Shorthand*. Experimental Edition, McGraw-Hill Book Company, 1969.

Leslie and Zoubek. *Gregg Shorthand, DJ Series*. Second Edition, McGraw-Hill Book Company, 1971.

Leslie and Zoubek. *Gregg Shorthand, Functional Method, DJ Series*. McGraw-Hill Book Company, 1963.

Leslie and Zoubek. *Gregg Shorthand, Functional Method, DJ Series*. Second Edition, McGraw-Hill Book Company, 1971.

### Texts – Semester 2

Leslie, Zoubek, Strony. *Gregg Dictation, DJ Series*. Second Edition, McGraw-Hill Book Company, 1971.

Leslie, Zoubek, Strony. *Gregg Dictation, DJ Series*. McGraw-Hill Book Company, 1963.

### Texts – Semesters 3 and 4

Balsley and Robinson. *Integrated Secretarial Studies*. Jubilee Ed., South-Western Publishing Company, 1964.

Bowman and Oliverio. *Shorthand Dictation Studies*. Jubilee Ed., Third Edition, South-Western Publishing Company, 1966.

Gregg, Leslie, Zoubek. *Gregg Speed Building, DJ Series*. McGraw-Hill Book Company, 1964.

Leslie and Zoubek. *Gregg Transcription, DJ Series*. McGraw-Hill Book Company, 1964.

Zoubek. *Gregg Expert Speed Building, DJ Series*. McGraw-Hill Book Company, 1968.

### Dictation Materials

Gregg Tests and Awards (New material each year)

Gilson, Goodwin. *Dictation Patterns*. Pitman Publishing Corporation, 1961.

Leslie and Zoubek. *Dictation for Mailable Transcripts*. McGraw-Hill Book Company, 1950

Leslie and Zoubek. *Dictation for Transcription, DJ Series*. McGraw-Hill Book Company, 1963.

Leslie and Zoubek. *Transcription Dictation, Simplified*. McGraw-Hill Book Company, 1956.

Programmed Shorthand Lab., Bulletin 10, State of Ohio, Department of Education, Division of Vocational Education.

Russon, Allien. *Shorthand Dictation ABC'S*. University Bookstore, University of Utah, Salt Lake City, 1963.

Zoubek. *Progressive Dictation with Previews, Simplified*. McGraw-Hill Book Company, 1956.

Zoubek. *Short Business Letters for Dictation and Transcription*. McGraw-Hill Book Company, 1970.

Zoubek. *Speed Dictation with Previews in Gregg Shorthand, DJ Series*. McGraw-Hill Book Company, 1963.

Shorthand Dictation Material and Transcription, Performance Data, Three-Minute Takes, Iota Alpha Chapter, Phi Beta Lambda, Wisconsin State University, Superior, Wisconsin 54881. Charge, \$1.25.

### Supplementary Materials

Dorris and Miller. *Complete Secretary's Handbook*. Second Edition, Parker Publishing Company, West Nyack, New York, 1960.

Gavin and Sabin. *Reference Manual for Stenographers and Typists*. Fourth Edition, McGraw-Hill Book Company, 1970.

Graded Transcribing Tests, DJ Series, 1964.

Gregg, Leslie, Zoubek. *Most-Used Words and Phrases, DJ Series*. 1963.

*Gregg Shorthand Dictionary, DJ Series*, 1963,

House and Koebele. *Reference Manual for Office Personnel*. Fifth Edition, South-Western Publishing Company, 1970.

Humphrey, Lambert, Newhouse. *Timed Writings for Typing and Transcribing, DJ Series*. McGraw-Hill Book Company, 1965.

Leslie. *20,000 Words*. Sixth Edition, 1971.

Leslie. *20,000 Words*. Fifth Edition, 1965.

### Reference Books – Methods

Douglas and others. *Teaching Business Subjects*. Prentice Hall, Englewood Cliffs, pp. 187-263, 1965.

Griggs. *Rx for Effective Shorthand Teaching*. Business Education World, May 1961.

Harms and Stehr. *Methods of Teaching Vocational Business Education*. South-Western Publishing Company, Second Edition, pp. 135–192.

### Instructor's Handbooks

Lamb, Marian. *Your First Year of Teaching Shorthand and Transcription*. South-Western Publishing Company, Second Edition, 1961.

## Shorthand I & II

Leslie, Louis. *Methods of Teaching Gregg Shorthand*. McGraw-Hill Book Company, 1953.

Newhouse, Howard. *Shorthand Teaching Success—Concluded*. *Business Teacher*, Vol. 41, No. 4, March-April, 1964.

Tonne and others. *Methods of Teaching Business Subjects*. McGraw-Hill Book Company, Third Edition, 1965, pp. 177-241.

Jester. *The Shorthand Transcription Process and Its Teaching Implications*. South-Western Publishing Company, Monograph No. 108, 1963.

Russon, Allien. *Methods of Teaching Shorthand*. South-Western Publishing Company, No. 119.

## VI. BOOKLETS, PERIODICALS, JOURNALS, MAGAZINES AND MONOGRAPHS

See listing under guidelines for Clerical and Secretarial Office Procedures.

## VII. FILMS, FILMSTRIPS, TAPES, RECORDS, TRANSPARENCIES, OPAQUE PROJECTIONS, CHARTS AND MODELS

### Filmstrips

CPS—"Emblem of Excellence," 14-inch with recorded narration. National Secretary Association, 1103 Grand Avenue, Suite 410, Kansas City, Missouri 64106.

"EDL Filmstrip Set for Gregg Shorthand," DJ Series, with teacher's manual. Gregg Division, McGraw-Hill Book Company, 330 West 42nd Street, New York, New York 10036.

### Tapes

"Speed Development Tapes" can be purchased in individual sets, in combination sets, or as a complete library. (Comprehensive Starter Set with transcript; Reinforcement Speed Set with transcript; Challenger Speed Set with transcript; Expert Speed Set with transcript) "Business Letters for Dictation and Transcription." "Multi-Channel Theory Dictation Tapes," correlated with Gregg Dictation, DJ Series. "Gregg Tape Cassettes." Gregg Division, McGraw-Hill Book Company, 330 West 42nd Street, New York, New York 10036.

Tapes, Cassettes and Cartridges dictated by radio announcers. Dictation Disc Company, 240 Madison Avenue, New York, New York 10016.

### Records

"Speed Dictation Records" selections from "Speed Dictation," DJ Series. "Student Dictation Practice Records." 50 - 130 wpm. "Theory Dictation Records," correlated with Gregg Shorthand, DJ Series. "Student Dictation Practice Records — Theory," 45 - 100 wpm. "Phrase Letter Dictation Records," correlated with Gregg Dictation, DJ series. Gregg Division, McGraw-Hill Book Company, 330 West 42nd Street, New York, New York 10036.

"Gregg Theory," "Brief Forms and Phrases," "5-Minute Dictation," "Challenge Sets," in speeds from 40 to 160 wpm. Dictation Disc Company, 240 Madison Avenue, New York, New York 10016.



**Transparencies**

Transparencies, correlated with Ninth Edition, 20th Century Typing, Special Applications. South-Western Publishing Company, 634 Broadway, Cincinnati, Ohio 45227.

**Charts**

"Brief Form and Phrase Chart in Gregg Shorthand," DJ series (25 charts). Gregg Division, McGraw-Hill Book Company, 330 West 42nd Street, New York, New York 10036.

Typewriting Wall Charts: "Block Letter," No. 8; "Modified Block Letter," No. 9; "Government Letter," No. 11; "Addressing Envelope and Folding and Inserting Procedures," No. 12; "Second Page Letters, Heading and Postcards," No. 13; and "Interoffice Memorandum and Telegrams," No. 14. South-Western Publishing Company, 634 Broadway, Cincinnati, Ohio 45227.

**Films**

See listing under guidelines for Clerical and Secretarial Office Procedures.

**VIII. EQUIPMENT AND SUPPLIES**

- A. One typewriter for each student
- B. One demonstration stand with typewriter
- C. File cabinet(s) for teacher and student use
- D. Bookcase(s) for reference books
- E. Overhead projector and screen
- F. Movie screen
- H. Controlled reader and/or tachistoscope
- I. Timing devices—stop watch and interval timer
- J. Tape recorder(s)
- K. Record Player(s)
- L. Recorded materials
  - 1. records
  - 2. tapes—commercial and teacher-prepared
- M. Storage cabinets for recorded materials
- N. Dictation Lab Equipment—multi-channel transmission equipment
- O. Student supplies
  - 1. Writing instruments—pens recommended
  - 2. Stenographic notebooks
  - 3. Typing paper—plain and letterhead
  - 4. Typing erasers
  - 5. Carbon paper

## IX. LAYOUT AND FACILITIES

### A. Classroom

The room should be large enough to accommodate the class comfortably, with sufficient room for technique demonstrations. It should also be very well lighted.

### B. Layout

The facilities in the classroom should be arranged in such a manner that all students can easily see all screens, chalkboards and demonstrations.

### C. Desks

Desks should be of a type which allows ample room for a typewriter and also a writing surface large enough for the textbook, a stenographic notebook and to allow the student's entire forearm to be placed on the desk while writing. L-shaped tables are recommended. There should also be storage room in the desks for extra books.

### D. Chairs

Should be individual, adjustable secretarial posture chairs with casters. If this type is not available, regular straight-backed chairs should be supplied in varying heights.

### E. Chalkboards

Must have sufficient chalkboards at the front of the room for presentation of new material—at least 16 feet long x 42 inches high.

### F. Bulletin Boards

Should have at least two bulletin boards for display and motivational purposes.

# CLERICAL AND SECRETARIAL OFFICE PROCEDURES

One year

Grade 12

Vocational

Clerical office practice integrates into one final course all the related general office skills and knowledges previously learned, along with the development of personal qualities necessary for success on the job.

In addition, secretarial office practice integrates the maintenance and development of shorthand speed and transcription of mailable copy. See Shorthand II and Transcription section.

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## I. OBJECTIVES\*

The student will:

- A. review correct typing techniques, tabulations, basic business forms and business correspondence
- B. when given a human relations case study selected by the teacher, prepare an analysis to discuss the case according to principles developed in the classroom, and the student must show evidence of having
  - 1. determined the real problem
  - 2. considered at least two possible solutions
  - 3. evaluated the possible solutions
  - 4. decided on the best method of resolving the problem
- C. when given a letter of average length (120 to 150 words) in office style dictation or from voice-transcribing machines, transcribe the material, at the typewriter in 8 to 10 minutes, with an envelope and carbon; must be acceptable format with all errors neatly corrected; must read smoothly and have the same meaning as the dictation intended
- D. when given a page of material (any kind), and without assistance, prepare a master and run several copies on the spirit duplicator; material must be accurate and usable as determined by the teacher; time limits will depend on the length and difficulty of the material to be reproduced
- E. repeat the above procedure using a stencil and stencil duplicator
- F. when given 50 randomly selected names of businesses and individuals, arrange in correct alphabetic filing order and type all 50 with 96 percent accuracy in 20 to 25 minutes
- G. demonstrate an acquaintance of skill in the operation of office adding and calculating machines; see Business Calculating Machines section
- H. when given a problem (such as wages per hour, number of hours worked, number of personal exemptions, current FICA tax and current state tax), determine the net pay. The student may use notes, tables, machines and references to assist in computing the amounts
- I. match a list of at least 30 terms useful in understanding data processing with a list of definitions
- J. show that she can use discretion in determining work priorities. She will do this by deciding the order and what type of action should be taken on a series of hypothetical office problems
- K. examine career opportunities as listed in the Dictionary of Occupational Titles and Occupational Outlook Handbook
- L. demonstrate preparation for job application, interview and placement by actually filling out sample business applications, participating in a mock interview, completing a career goal profile and locating possible job opportunities identifying

\*The minimum acceptable standards should be determined by the individual teacher. Suggested standards are given in Chapter IV of this section.

1. qualifications necessary
  2. starting salary
  3. promotional opportunities
  4. company benefits
- M. use informational guides, such as Dictionary of Occupational Titles (D.O.T.), Occupational Outlook Handbook, Airlines Guide, Redbook of Hotels and Motels, postal and shipping guides, directories and other references.

## II. UNITS—TOPICAL OUTLINE

- A. Orientation
1. Techniques of electric typing
  2. Complete review of letters, tabulated reports, correction techniques, carbons and envelopes.
  3. Skill, speed and accuracy development
  4. Demonstration and general instructions for use of transcribing, duplicating, calculating and any other machines.
- B. Office procedures and practices (refer to textbook)
1. Business behavior and human relations
  2. Health, grooming, suitability of dress and poise
  3. Receptionist duties--receiving callers, handling inquiries and appointments
  4. Telephone techniques and special telephone equipment
  5. Telegrams and telegraphic services
  6. Special techniques in taking dictation (Secretarial Office Practice) and transcribing
  7. Office equipment and supplies
  8. Sources of information
  9. Incoming and outgoing mail
  10. The writing of effective business letters; composing at the typewriter
  11. Travel and transportation services; planning itineraries
  12. The office worker's financial duties, including payroll
  13. Data Processing, with stress on terminology
  14. Obtaining a job
    - a. Job sources
    - b. Application letters

## Clerical and Secretarial Office Procedures

- c. Personal data sheets
- d. Application forms
- e. Personal interviews

### C. Office production typing jobs

Appropriate forms or a typing practice set may be used. Jobs may be selected at the discretion of the teacher; certain ones may correlate with the office procedures and practices as shown in Part B above.

### D. Related learnings

- |                  |                         |
|------------------|-------------------------|
| 1. Grammar       | 6. Proofreading         |
| 2. Spelling      | 7. Listening            |
| 3. Punctuation   | 8. Following directions |
| 4. Vocabulary    | 9. Speaking             |
| 5. Word division | 10. Arithmetic          |

### E. Filing

- 1. Indexing rules and application in alphabetic, geographic, numeric, subject and specialized filing systems
- 2. Use of card files and correspondence files
- 3. Special filing equipment
- 4. Filing methods and procedures
- 5. Duties of the file clerk
- 6. Typing
  - a. Index cards (chain feeding)
  - b. File folder labels
  - c. Cross-reference sheets

### F. Duplicating (Also see Business Machines Guidelines)

- 1. Preparation of stencils, spirit masters and offset mat
  - a. Methods of correcting
  - b. Arrangement, layout and illustrations
    - 1) Use of illuminated drawing board (scope)
    - 2) Styli, lettering guides and screen plates
  - c. Special jobs: bulletins, programs, brochures, class reference materials
- 2. Use of duplicating supplies and materials
- 3. Operation and care of duplicating machines--stencil duplicator, fluid duplicator and offset machines
- 4. Copy machine
  - a. Preparation of single copies

- b. Preparation of thermal spirit masters for duplicating
  - c. Preparation of transparencies
- G. Transcribing machines (Also see Business Machines Guidelines)
- 1. Efficient operation for vocational competence
  - 2. Transcription of mailable copy
  - 3. Carbon copies and envelopes
- H. Business calculating machines (Also see Business Machines Guidelines)
- 1. Sufficient training for the clerical employee's use of
    - a. 10-key adding machine (touch system)
    - b. Printing calculator
    - c. Electronic calculator
    - d. Rotary calculator
    - e. Key-driven calculator
- I. Vocational and occupational tests
- 1. SRA Clerical Aptitudes Test - Should be administered early in the senior year or may be given during the junior year.
    - Science Research Associates
    - 57 West Grand Avenue
    - Chicago, Illinois 60611
  - 2. General Aptitude Test Battery - Administered by the Montana State Employment Service early in the senior year; valid for determining clerical aptitude.
    - Contact your nearest
    - Montana State Employment Office
  - 3. Montana State Joint Merit Tests - To qualify for employment in clerical, typing and stenographic positions in a number of State departments and agencies.
    - Joint Merit System
    - Helena, Montana 59601
  - 4. U.S. Civil Service Examinations - for federal employment as stenographer, typist, clerk and office machine operator.
    - Your local post office

### III. TEACHING METHODS

The teaching methods in Clerical and Secretarial Office Procedures are unlimited and will vary from unit to unit depending upon the structure of the course.

Some suggestions are

- A. Demonstration
- B. Lecture

## Clerical and Secretarial Office Procedures

- C. Class discussion
- D. Student reports
- E. Machine rotation
- F. Field trips
- G. Guest speakers
- H. Films, filmstrips and transparencies
- I. Job instruction sheets
- J. Practice sets and projects
- K. Interviews
- L. Simulated projects

See related guidelines for further suggestions.

## IV. EVALUATION, STANDARDS OF PERFORMANCE, TESTING AND GRADING

The overall evaluation for each grading period should be prorated according to the amount of time spent in class on a given area or activity.

### A. Straight-copy typing

#### First Semester

Length: 5 minutes  
Errors: 5 or less

63-up = A  
56-62 = B  
46-55 = C  
40-45 = D

#### Second Semester

Length: 5 minutes  
Errors: 3 or less

65-up = A  
59-64 = B  
49-58 = C  
40-48 = D

### B. Office Procedures and Practices

Achievement tests to accompany testbooks are available from publishing companies, or the teacher may construct suitable tests. Grading may be curved according to class performance or school policy.

Stress the importance of all the various personal qualities--from attitudes and relations with others to personal appearance, voice and conduct. Personality check lists may be utilized throughout the course.

### C. Office Production Typing Jobs

Various methods of grading may be devised by the teacher involving point system or check lists. Ultimately, the only valid criterion is whether the job would be **usable** or **mailable** by business standards.



It is wise, whenever possible, to grade all papers of a given assignment at one time. This may help to prevent the teacher's personal mood from influencing the evaluation.

D. Related Learnings

Although written tests may be given in a number of areas included in the related learnings (such as spelling, punctuation and arithmetic), generally evaluation is integrated with all other units as these skills are applied in production work.

E. Filing

Filing exercises with index cards and correspondence may be separately graded with progressively higher standards set for each successive exercise. Aim for minimum 90 percent accuracy by the end of the filing unit. A text-related achievement test may also be administered.

F. Duplicating

Consider:

1. wise use of materials
2. operation and care of machines
3. usability of the duplicated copies

G. Transcribing machines

Only mailable copy is acceptable.

H. Business Calculating Machines

The major goals in office procedures should be techniques and accuracy.

## V. TEXTBOOKS AND TEXTBOOK REFERENCES

### Texts - General

Agnew and others. *Clerical Office Practice*. Fourth Edition, South-Western Publishing Co.

Agnew and others. *Secretarial Office Practice*. Seventh Edition, South-Western Publishing Co.

Archer and others. *General Office Practice*. Third Edition, McGraw-Hill Book Company, 1968.

Barron and Taylor. *Clerical Office Training*. Prentice-Hall, 1963.

Friedman and Grossman. *Modern Clerical Practice*. Pitman Publishing Corporation.

Gregg, Fries, Rowe, and Travis. *Applied Secretarial Practice*. Sixth Edition, McGraw-Hill Book Company, 1968.

Strony and others. *The Secretary at Work: A Brief Finishing Course in Secretarial Procedures*. Third Edition, McGraw-Hill Book Company, 1966.

## Clerical and Secretarial Office Procedures

### Texts - Filing

Bassett and others. *Business Filing and Records Control*. Third Edition, South-Western Publishing Co.

Fahrner and Gibbs. *Basic Rules of Alphabetic Filing*. programmed, South-Western Publishing Co.

Guthrie. *Alphabetic Indexing*. Third Edition, South-Western Publishing Company, 1964.

Kahn and others. *Gregg Quick Filing Practice*. McGraw-Hill Book Company, 1965.

Kahn and others. *Progressive Filing*. Eighth Edition, McGraw-Hill Book Company, 1968.

SRA. *Filing Skills*. A programmed course in fundamentals of effective filing, 1964.

### Texts - Grooming

Witcomb and Cochran. *Charm for Miss Teen*. McGraw-Hill Book Company, 1969.

### Texts - Office Machines

See: Duplicating Machines  
Adding/Calculating Machines

### Texts - Typewriter

Lessenberry and others. *20th Century Typewriting*. Ninth Edition, South-Western Publishing Co.

Liles and others. *Typing Mailable Letters*. Second Edition. McGraw-Hill Book company, 1968.

Rowe and others. *Gregg Typing, 191 Series, Book 2: Vocational Office Typing*. Second Edition, McGraw-Hill Book Company, 1967.

### Practice Sets

Agnew and Atkinson. *Typewriting Office Practice*. Fourth Edition, South-Western Publishing Co.

Frisch and Handal. *Applied Office Typing*. McGraw-Hill Book Company, 1969.

*Essential Business Forms. Essential Business Practice*. Second Edition, The H.M. Rowe Company.

*Office Practice for Typists*. Second Edition Revised, and Laboratory Materials, The H. M. Rowe Company.

*Office Typing*. Revised, and Envelope of Working Materials, H. M. Rowe Company.

### References

Baron and Stinfeld. *Clerical Record Keeping*. South-Western Publishing Co.

Doris and Miller. *Complete Secretary's Handbook*. Prentice Hall.

Fisher. *Intensive Clerical and Civil Service Training*. Fourth Edition, South-Western Publishing Co., 1968.

- Gavin and Hutchinson. *Reference Manual for Stenographers and Typists*. McGraw-Hill Book Company, 1970.
- House and Koebele. *Reference Manual for Office Personnel*. South-Western Publishing Co., 1970.
- Hutchinson. *Standard Handbook for Secretaries*. McGraw-Hill Book Company, 1969.
- Lessenberry and others. *Typewriting Style Manual*. South-Western Publishing Co.
- Miller. *Private Secretary's Encyclopedia Dictionary*. Prentice Hall
- Pendery. *Clerical Payroll Procedures*. Fifth Edition, South-Western Publishing Co., 1967.
- Silverthorn. *Work Division Manual*. South-Western Publishing Co.
- Tonne and others. *Business Principles, Organization and Management*. South-Western Publishing Co.
- Wanous and Wanous. *Automation Office Practice*. South-Western Publishing Co., 1964.

**General Reference**

- Airlines Guide
- Almanacs (including Montana Almanac)
- Atlases and guide books
- Biographical directories
- Book and periodical directories
- Book of Quotations
- Business, Governmental and Professional Directories and Services
- City directories
- Dictionary of Occupational Titles (DOT)
- Encyclopedias
- Etiquette books
- Grammar and writing manuals
- Hotel and Motel Red Book
- Local telephone directories
- Occupational Outlook handbook
- Parliamentary procedure handbook

## Clerical and Secretarial Office Procedures

Postal and shipping information

Standard dictionaries

Style books

Technical references

Teletrainer booklets from Mountain Bell Telephone

Thesaurus

Travel publications

Word finders

## VI. BOOKLETS, PERIODICALS, JOURNALS, MAGAZINES AND MONOGRAPHS

*Secretarial Shortcuts*. IBM Corporation, Office Products Division, Educational Services Department, 590 Madison Avenue, New York, N.Y. 10022, 1960. Covers transcription hints, office routine suggestions, typewriter hints, electric typewriter production, multiple copies, care of the typewriter, offset masters, supplies, etc.

South-Western Publishing Company **Monographs** by number and subject:

- 83 Revised 1967, Guidance in Business Education
- 91 Handbook for Office Practice Teachers
- 92 Revised 1969, Visual Aids for Business and Economic Education
- 97 Production Typewriting
- 100 The Business Curriculum
- 103 Your First Year of Teaching
- 112 Planning the Facilities for Business Education
- 117 Practices and Preferences in Teaching Typewriting
- 356 Suggestions for Programs of Office Practice and Procedures
- 660 Typewriting Style Manual

### Business education periodicals

*The Journal of Business*

*American Business Education*

*The Business Education World*

*The Balance Sheet*

*The Journal of Business Education*

*The National Business Education Quarterly*

*AMS Management Bulletin*

*The Office*

*Business Automation*

*Business Education Forum*

*Sincerely Yours*

*Office Supervisor's Bulletin*

### Pamphlets and booklets

Published by such special interest groups as insurance companies, banking associations, phone companies, consumer finance associations, equipment manufacturers and professional organizations which directly relate to the area of clerical and secretarial office procedures.

## VII. FILMS, FILMSTRIPS, TAPES, RECORDS, TRANSPARENCIES, OPAQUE PROJECTIONS, CHARTS, MODELS

Keep a record of each film or filmstrip--when and to whom it was shown, what it is about, if it is worthwhile, for what groups it is suitable, sound or silent, color or black and white.

For filmstrips, tapes, records, transparencies, opaque projections, charts and models refer to

1. Price lists of publishers of textbooks
2. *Visual Aids for Business, Monograph 92.* South-Western Publishing Company
3. *Gregg Instructional Aids Catalog and Guide.* McGraw-Hill Publishing Company
4. Teacher's Manual for the textbook

### Film Sources

Films may be obtained from the following sources. Write for catalogs and price lists.

A.B. Dick, 5700 Touby Avenue, Chicago, Ill. 60648

Audio Visual Department, U.S. Office of Education, Washington, D.C.

Audio-Visual Instruction, University of Wisconsin, Box 2093, Madison, Wis. 53701

Bailey Films, Inc., 6504 DeLongpre Avenue, Hollywood, Calif. 90028

Business Education Films, 4607 16th Avenue, Brooklyn N.Y. 11204

Coronet Films, 65 E. South Water Street, Chicago, Ill. 60601

Encyclopedia Britannica Films, 425 North Michigan Avenue, Chicago, Ill 60611

IBM local representative or, 160 East Grand Avenue, Chicago, Ill. 60611

McGraw-Hill Book Company, Text-Film Division, 330 West 42nd Street, New York, N.Y. 10036

Modern Talking Picture Service, 160 East Grand Avenue, Chicago, Ill. 60611

National Education Films, NEA Building, 1201 Sixteenth St., N.W., Washington, D. C. 20036

Remington Rand Division, Sperry Rand Corporation, 1290 Avenue of the Americas, New York, N.Y. 10019

Roundtable Films, Inc., 321 S. Beverly Drive, Beverly Hills, Calif. 90212

Stenotype Company, 417 S. Dearborn Street, Chicago, Ill. 60605

State Film Library, Office of Superintendent of Public Instruction, Helena, Mont. 59601

Sterling Movies, 6833 Sunset Boulevard, Los Angeles, Calif. 90069

Xerox Corporation, Audio-Visual Services, Midtown Tower--2nd Floor, Rochester, N.Y. 14604

Local telephone office

## VIII. EQUIPMENT AND SUPPLIES

### Basic Equipment

L-shaped desks  
Adjustable desks  
Work tables  
Standard chairs  
Adjustable typing chairs  
Chalkboards  
Bulletin boards  
Sink  
Electric outlets  
(Electrifact Wiring)  
Bookcases  
File Cabinets  
Full-length mirror  
Student storage facilities w/locks

### Teacher Equipment

Teacher's desk  
Teacher's chair  
Desk tray  
Telephone  
Filing cabinet  
Storage facilities

### Instructional Equipment

Demonstration stand  
Overhead projector  
Opaque projector  
Movie projector  
Pull-down screen  
Tape recorder  
Record player  
Wireless dictation equipment  
Controlled pacer  
Tapes  
Records  
Teletrainer (from telephone co.)  
Unabridged dictionary and stand  
Intercom telephone system

### Machines

Dictating/transcribing machines  
Duplicating machines  
    Spirit duplicator  
    Stencil duplicator  
    Copier  
    Offset  
Rotary calculators  
Printing calculators  
Key-driven calculators  
Ten-key Adding-Listing machines  
Key punch machines  
Electronic calculators

### Typing Equipment

Electric typewriters  
Manual typewriter  
Long-carriage typewriters  
Proportional-spacing typewriters  
Automatic typewriters  
Copyholders

### Miscellaneous Equipment

Illuminated drawing board  
Lettering guides  
Styli and holders  
Screen plates  
Paper cutters  
Paper punch  
Pencil sharpener  
Staplers  
Wastebaskets  
Interval timer  
Stop watch  
Machine repair tools

**Supplies**

Typing paper	Stencils
Carbon paper	Masters
Onionskin	Offset mats
Letterhead paper	Duplicating paper
Envelopes	For fluid duplicator
Postcards	For stencil duplicator
Carbon sets	For offset
Typewriter ribbons	Duplicating fluid
File Folders	Duplicating ink
Letter size	Correction fluid for stencils
Legal size	Stencil cement
Rolled labels	Correction items for masters
Felt-tip pens for overhead	Razor blades
Offset supplies	Correction tape
Staples	Blockout pencils
Staple remover	Fiberglass pencils
	Cello tape
	Cello tape dispenser

Small office supplies such as: paper clips, pins, paste, rubber bands, scissors, chalk, chalk holder

**IX. LAYOUT AND FACILITIES**

The following suggestions may be considered in planning facilities for the office procedures classroom:

- A. Size 1,000 - 1,440 square feet
- B. Chalkboards and bulletin boards
- C. Sink facilities
- D. Acoustical treatment of room
- E. At least two electrical outlets per desk
- F. Adequate storage space
- G. Master switch





## SIMULATED OFFICE LABORATORY

One Semester or One Year

Grade 12

Vocational

According to *Webster's Seventh New Collegiate Dictionary*, to simulate is "to assume, give the appearance or the effect of, copy, represent." It would follow then that a simulated office laboratory imitates, copies, or represents an existing business. It is a method of bringing the office to the student in order to provide realistic learning experiences in office education so that when the student goes to the office, there will be little difficulty in adjusting.

Of the five approaches used by teachers in teaching office practice (cooperative, directed, simulated, rotation/battery, or lecture), simulating ranks extremely high as a method in providing realism in instruction. By maintaining an office-like atmosphere in the classroom, by having the students conduct themselves as office employees and by providing the students "like-real" assignments requiring cooperative effort and completion according to office standards of acceptability, the student is placed in thinking-deciding-applying-doing situations to help him bridge the gap between the classroom and office job.

The student must coordinate many previously learned skills and knowledge in actual business office operations. The key to successful simulation is--"Make It Real!"

The simulated office laboratory is not designed to replace any of the existing business education classes. It should be considered an opportunity for students in office procedures classes to put together a coordinated skill package of such basic business skills as typing, shorthand, bookkeeping, business machines and filing, as well as attitudes and understanding that will give him a better chance for success on the job.

It is a capstone activity and can be designed to provide enrichment for students of all ability and skill levels.

All schools offering secretarial or clerical office training can benefit from a simulated office laboratory.

Schools that cannot operate a cooperative office education program should have a simulated office laboratory program. However, schools that can and are operating a cooperative office education program should also offer a simulated program for those students not participating in the co-op.

Any school--small, medium or large--can and should offer a Simulated Office Laboratory Program within the clerical or secretarial office procedures class. Elaborate and expensive furniture and equipment are not necessary to operate a simulated office. A small office could operate with five or six desks or tables, two or three typewriters, and an adding machine or two. However, a true business office atmosphere with real office furniture and a sufficient supply of up-to-date equipment will greatly enhance the learning situation.

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## I. OBJECTIVES\*

The student will:

- A. show evidence of adjustment to the business world of work
- B. demonstrate his preparation for job applications, interview and placement by actually filling out sample business applications, participating in mock interviews and locating possible job opportunities
- C. demonstrate the ability to apply and refine skills and knowledge acquired in previous business courses by completing various simulated activities to be evaluated by the teacher according to business standards
- D. explore through visitations and selected reading local and regional office occupations. The student will show that he has done this by reporting to the class
- E. perform in an efficient businesslike manner and work harmoniously with others
- F. use self-direction, understanding and skill in the performance of office tasks
- G. show initiative and a sense of responsibility for quality, quantity and economy in production
- H. work in the various stations representing an organization and thereby acquire an understanding of work flow, office manuals, procedure manuals and the continuity of all office operations
- I. recognize, define and evaluate various office problems; apply previously acquired skills, knowledge and understanding; make necessary decisions; and then evaluate the results of his actions.

## II. UNITS--TOPICAL OUTLINE

A topical outline has not been provided in this guideline because all units are integrated into the various types of simulation and simulated projects.

## III. TEACHING METHODS--Types of Simulation

### A. Culmination activity simulation

The basic knowledges and skills are taught on a rotation, block or unit basis. Reading and pencil-and-paper type learning exercises help the students develop the understandings required to perform the work. An opportunity to apply these understandings is made possible by having the class participate in a segment of office work requiring them to perform an activity after reading about the activity. An example is having the students participate in processing incoming and outgoing mail after they have studied postal regulations and services and mail-handling procedures.

### B. Task simulation

This is a method of using integrated and simulated tasks or projects to provide realistic office experiences and procedures. Transfer of learning is enhanced through the continual stressing of concept development. This type of simulation also lends itself very well to adjusting for individual differences and to evaluating student progress. Further information regarding this type of simulation may be obtained through the Michigan State University Research and Development Program in Vocational Office Education, Michigan State University, East Lansing, Michigan.

## Simulated Office Laboratory

### C. Position Simulation

This is the development of individual training stations within the simulated office laboratory. The office education teacher is encouraged to cooperate with various local businessmen to develop the various training stations, which might represent a company or a position in a company. The materials used in the various training stations are real--they come from the businesses being simulated. Each training station is also supplied with all necessary information regarding the company such as history, organizational chart, flow chart, job description, job instructions, etc. Information regarding position simulation may be obtained by contacting the Indiana State Department of Public Instruction, Division of Vocational Education, Indianapolis, Indiana.

### D. Model office simulation

This is the simulation of an entire office within the laboratory. The number of students involved at one time as personnel in the "office" can depend on the size of the actual office being simulated or on the size of the class. This method employs a definite chain of command within the office and also a definite flow of work, both of which enhance the interaction of the students.

There are two basic methods of supplying the input materials necessary for the operation of the "model office."

1. Utilizes a "simulator." The simulator is a student, or the teacher if necessary, who places teacher-prepared input materials into the office in a well-controlled manner. All of these input materials **MUST** be prepared prior to the "opening" of the simulated office and are kept in contingency files.
2. Supply the input materials is to have these materials generated by class members who are not holding positions in the "office" or by some other outside source.

## IV. ORGANIZING A SIMULATED OFFICE LABORATORY

### A. Suggested procedures to organize and initiate a simulated office laboratory

1. Contact the Business Education Supervisor, Office of the Superintendent of Public Instruction, Helena, for guidance in establishment of the program. Read available material on office simulation. (Refer to resources and references section of this program.)
2. Review office practice objectives and course content.
3. Know the special characteristics, advantages and disadvantages of the simulated method.
4. Sell, promote and justify the need for the program to the administration and school board.
5. Assess the social and academic backgrounds of the students who will be enrolled.
6. Take a complete inventory of the equipment available and determine what additions the budget will permit. A telephone system, a two-period block of time in the same room and teacher planning time are desirable.

7. Choose the type of office to simulate.
8. Study in detail the actual office and office workers to be simulated.
9. Design the model office for classroom operation.
10. Add finishing touches, gather supplies and set up evaluation procedures. Use of a Business Advisory Board is recommended.

B. Steps to follow in designing simulated office laboratory

1. Set up an imaginary company; give it a name and organization structure.
2. Prepare a personnel manual for the company, list job titles for the office workers employed and compile descriptions of each job.
3. Establish a flow of work.
4. Prepare a simple desk manual for each work station or position in the office.
5. List equipment and supplies needed by each employee.
6. Prepare activities, or outline activities to be prepared by the students in other classes, which will generate the work performed by the office. A contingency list should also be prepared to vary the established routine, to cause interruptions, to change the work load, to create stress or provide recognition.
7. Decide upon the procedure to follow in opening the company office and setting the operation in motion.
8. List the items which need to be prepared before the actual operation of the office.
9. Add finishing touches to make the basic operation more office like.
10. Set up an evaluation system.

## V. EVALUATION

Several types of evaluation might be used in grading and evaluating students in a simulated office program

A. Pre-testing materials

1. "Wonderlic Personnel Test" Form A.E.F. Wonderlic, Box 7, Northfield, Illinois
2. Factored Aptitude Series, "Numbers" Exhibit D, Industrial Psychology, Inc., Chicago, Illinois
3. Same as Number 2, but test of "Perception"
4. The National Business Entrance Tests. Selections may be made from the General Testing Series: Business Fundamentals and General Information Test, Bookkeeping and Accounting Test, General Office Clerical Test, Machine Calculation Test, Stenography Test, Typewriting Test. Available from the National Business Education Association, Joint Committee on Tests, Box 47, NEA Center, 1201 Sixteenth St., N.W., Washington, D. C. 20036

## Simulated Office Laboratory

- B. Select a rush job that would fit the position. Job must be done under time limit and given to instructor
- C. Spot checking of student work by instructor
- D. Student evaluation- by student himself; by student office manager
- E. Student conferences with instructor
- F. Debriefing sessions- staff meetings of all office personnel called by instructor
- G. Audio-video recordings for evaluation of program
- H. Refer to evaluation forms under the Cooperative Education Guideline

## VI. RESOURCES FOR SIMULATED OFFICE LABORATORY

*Business Education Forum*. February, 1970. Seven articles by varied authors, all on Office Simulation Laboratory.

*Lester Hill Office Simulation*. Krawitz, McGraw-Hill Book Company, 1971.

*Overview of the Intensive Program*. Ohio State Board of Education, Division of Vocational Education, State of Ohio 43215.

*Policies and Guidelines for Administrators, Teachers, and Coordinators in Business and Office Education*. Compiled and edited by John D. Lee. Vocational Instructional Materials Laboratory, Division of Industrial Education, Indiana State University, Terre Haute, Indiana 47809.

*Simulated Office Education Course of Study*. Instructor's Guide, 1966. Division of Vocational and Technical Education, 1400 University Club Building, Salt Lake City, Utah 84111.

*Teacher's Guide, Simulated Office Practice*. Instructional Materials Laboratory, Department of Vocational Education, College of Education, University of Kentucky, 1967-68.

## VII. SUGGESTED REFERENCES

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Archer, Fred C. "Communications in Office Practice," *Business Teacher*. XLIII, Sept.-Oct., 1965.

Archer, Fred C., "Reappraise Your Telephone Training," *Business Teacher*. XLIV, May-June, 1967.

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- First Bank, High School Branch*. An Employees manual. Phoenix, Arizona: South Mountain High School, 1966. Mimeographed.
- Fowler, Ernest P. Letter and enclosures sent in answer to a request for information regarding Merit System standards. Ernest P. Fowler, Examinations Supervisor, Division of Recruitment and Examinations, Department of Personnel, Commonwealth of Kentucky, Frankfort, Kentucky, November 6, 1968.
- Fuller, Marietta Cain. "Small Schools Can Initiate Vocational Business Education," *The Journal of Business Education*. December, 1970.
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- Exhibit 14. Dexterity and perceptual test. 1963. 4 pp. Cat. No. CS 1.28:2400/3/ exhibit 14.
- Exhibit 15. Letter Series Test. 1963. 4 pp. Cat. No. Cs 1.28:2400/3/ exhibit 15.

## VIII. EQUIPMENT AND SUPPLIES

### Equipment

A simple office may be established with typewriters and some simple office accessories. Additional equipment will, of course, enhance the reality of the atmosphere and enable a wider variety of activities to be provided for.

### Suggested Equipment List

- L-shaped desks and posture chairs
- Combination dictating and transcribing unit
- Transcribing unit
- Electric typewriters
- Filing cabinets or drawers
- Adding machines or calculators or both
- Stencil duplicator with stand
- Mimeoscope
- Styli, lettering guides, shading guides
- Collating table
- Stencil storage box
- Fluid duplicator
- Telephone hookup

### Additional Equipment & Supplies

Additional equipment and supplies may be added if the employment situation demands and the budget permits.

- Key punch machine
- Bookkeeping or posting machines
- Time clock and time-card rack
- Checkwriting machine
- Postage meter
- Photocopier
- Signature, date, paid, and rec'd rubber stamps and stamp pads
- Stapler
- Desk calendar
- Postal scales
- Dictionaries and other office handbooks
- Stick and spindle files
- Paper weights
- Staple removers
- Wire baskets and stationery stack trays
- Stationery separators

Inventory cards or an inventory record should be made for each piece of equipment. The record should contain such information as purchase price, date of purchase, type of machine or gadget, model or serial number, manufacturer, desk or station where assigned, place and telephone number to call for service and space to list repairs made and dates. Students should assist the teacher in the care and maintenance of the equipment.

## IX. LAYOUT AND FACILITIES

A high school which schedules simulated office practice every period in the school day may wish to set aside a room for this purpose, remove the chalkboards and bulletin boards, purchase color-coordinated office furniture and wall-to-wall carpet, use partitions to enclose private offices for the executives and obtain some of the myriad gadgets used to facilitate office work. It is not realistic, however, to expect an ordinary classroom in the average high school to look exactly like an office, especially when other classes must meet in the room during the day. The chalkboards and bulletin boards are needed for the basic instruction given in the simulated office company training program as well as for instruction in other classes.



# COOPERATIVE OFFICE EDUCATION

One year

Grade 12

Vocational

Cooperative office education is a program of vocational education for students who, through a cooperative arrangement between the school and employers, receive instruction, including required academic courses and related vocational instruction by alternation of study in school with a job in an office occupation. These two experiences must be planned and supervised by the school and employers so that each contributes to the student's education and to his employability. Work periods and school attendance may be on alternate half-days, full-days, weeks or other periods of time in fulfilling the cooperative work-study (vocational education) program.

The most important consideration in student selection is whether the individual will benefit from the cooperative vocational education program. The student must be at least 16 years of age, a senior and must meet criteria established by the supervisor. A variety of individuals may be involved in the student selection process. This includes students, parents, teacher-coordinators, participating employers, faculty, administrators and counselors. In the final analysis the selection of students is the job of the teacher-coordinator because the program is his responsibility. He may ask others to help, but he should not delegate the task. The parent must give written consent for the student to participate in this program. Generally, the student receives one credit for in-class work and one additional credit for related on-the-job experience.

For information on establishment and administration of a cooperative office education program, contact the Office of State Superintendent of Public Instruction, Helena, Montana 59601.

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## Cooperative Office Education

### I. OBJECTIVES\*

The student will:

- A. acquire an understanding of the expectations of business and the school for COE students by
  - 1. filling out an application for admittance to the COE class, including a statement of career objective
  - 2. reading, understanding and signing a training agreement stating his responsibilities to his job, to the employer and to the school
- B. show that he possesses skills necessary for initial employment at an entry level by
  - 1. typing at a speed of 40 words a minute on straight copy with syllabic intensity of no more than 1.40 for five minutes with no more than five errors
  - 2. demonstrating typing production skill on letters, forms, tables and memoranda with varying number of carbon copies and with all errors corrected at rates appropriate for each application, such rates being determined by the teacher-coordinator
- C. demonstrate his preparation for job applications, interview and placement by actually filling out sample business applications, participating in mock interviews, completing a career goal profile and locating possible job opportunities
- D. demonstrate that he has certain traits, habits and attitudes that would be desirable on the job by doing the following throughout the course
  - 1. having an acceptable attendance and punctuality record as defined by the teacher-coordinator
  - 2. handing in assignments on time and promptly making up all work missed
  - 3. adhering to conduct standards set up by the teacher-coordinator to create an office-like atmosphere
- E. comprehend how the business in which he is employed relates to the total economic spectrum of the local community or region in terms of services and/or products. He will do this by compiling a manual which will include
  - 1. company history, background and image in the community
  - 2. names, duties and civic activities of the personnel
  - 3. the student's responsibilities and duties as designated by his immediate supervisor
  - 4. reference materials related to his job in particular
  - 5. opportunities for advancement
- F. perform satisfactorily on the job as evidenced by his supervisor's written periodic evaluation sheets and perform satisfactory in the classroom as determined by the teacher-coordinator's evaluation.

\*The minimum acceptable standards should be determined by the individual teacher.

- G. given a human relations case study prepared in advance by members of the class from actual on-the-job training student experiences, prepare an analysis. This analysis should attempt to discuss the case according to principles developed in the classroom
- H. display his knowledge of automated data processing by matching a list of at least 30 terms useful in understanding data processing with a list of definitions.

## II. UNITS--TOPICAL OUTLINE

Suggested units to cover in the related classroom instruction (not listed in order of importance or instruction)

- A. Orientation to cooperative office education
  - 1. What is cooperative office education?
  - 2. Forms completed for the student-employee file
    - a. Application for the program (will have been completed in the spring of last year)
    - b. Training Agreement Contract (between employer, student-employee, teacher-coordinator and parent); signed by and copy for each party.
    - c. Other forms will be included in the student's file, and examples of these are in this section.
    - d. Employer evaluation form (shall be discussed with the student at the beginning of the year)
  - 3. Student responsibility to the class, school, coordinator, employer, and parents
- B. Attitude, personality and personal improvement
- C. Grooming
- D. Typing
- E. Spelling (to be emphasized throughout the year)
- F. Filing
- G. Telephone
- H. Mailing
- I. Duplicating
- J. Calculating
- K. Receptionist
- L. Travel and transportation
- M. Training station reports (reports may be given by each student)
  - 1. Name and location of business; type of services offered

## Cooperative Office Education

2. Name of employer; number of employees
  3. Personal duties
  4. Kinds of equipment used
  5. Fringe benefits
  6. Typical day at the office
  7. Relate any interesting experiences to the class
- N. Job training discussions and individual discussions
- O. Income tax instruction
- P. Transcribing machines
- Q. Job application and interview
1. Letter of application
  2. Personal data sheet
  3. Application form
  4. Interview
  5. Follow-up letter
  6. Holding the job
  7. Terminating employment properly
- R. Office education manual (A compilation of materials which the student feels will help him upon graduation in new employment or in further education)
- S. State Merit Tests
- T. Civil Service Tests
- U. O.E.A. (Office Education Association) should be included as part of the cooperative office education program. It is a cocurricular activity and therefore is included in the related classroom instruction.
1. Purpose and organization
  2. Election of officers
  3. Dues and money-making plans and projects
  4. Contests and contest materials and student responsibilities
  5. Parliamentary procedure



6. Calendar outline of events throughout the school year

Refer to South-Western's Monograph 82, *A Handbook for Advisors of High School Business Clubs*.

### III. TEACHING METHODS

- A. Many of the procedures for initiating a cooperative program and operating it are in the coordinator's handbook or in other pamphlets and brochures distributed by the Office of the State Superintendent of Public Instruction.
- B. In the classroom portion of the cooperative office education program some time will be spent instructing all students in a formal manner. Additionally, the coordinator will spend a great deal of time instructing on the specific subject matter concerned with the individual student's career objective or field of interest.
- C. Textbooks are listed in this guide; however, many booklets and other valuable materials are available from corporations and companies.
- D. The following are some of the learning experiences that should take place in the cooperative classroom or on the job:
  1. coordination of classroom and on-the-job training
  2. lecture and discussion
  3. buzz groups
  4. student demonstrations
  5. job interviews by students
  6. student-teacher conferences
  7. oral job reports
  8. written job reports
  9. individual instruction and learning
  10. role playing
  11. programmed units and books
  12. special events combining school, job and community
  13. field trips
  14. resource speakers
  15. exhibits and information
  16. use of audiovisual materials
  17. student surveys
  18. participation in Office Education Association

#### IV. EVALUATION, STANDARDS OF PERFORMANCE, TESTING AND GRADING

A. Standards of performance

Effective related instruction is enhanced when the teacher-coordinator adheres to the vocational approach to instruction.

1. The teacher-coordinator should use in vocational classes the principle that **the standards on the job should be the standards of his classroom**. Performance in the school is inadequate if it does not meet the minimum standards expected by employers; of course, the teacher may wish to pursue standards above those of some employers.
2. Those things which the student-employee needs to know early in his job are taught at the beginning of the school year regardless of when the topic might be taught according to the chapter sequence of the textbook.
3. Educating a student-employee involves educating him as a "total package of behavior." Skill alone is not enough for success on the job. The student-employee must have human relations competencies, good attitude, the ability to problem-solve and desirable personal qualities.

B. Testing, grading and evaluating

1. The testing, grading and evaluating of the student-employee on the classroom instruction is based upon his performance on:
  - a. written subject matter assignments and tests
  - b. work in assigned manuals
  - c. oral presentations
  - d. other individual and group projects using office machines and equipment
2. A portion of the student's grade could be based on attendance, proper use of time and certainly the quantity and quality of performance in the classroom.
3. The evaluation of the student-employee's on-the-job training and his performance progress is based on:
  - a. observations of the teacher-coordinator
  - b. consultations with the training station supervisor
  - c. a student-employee evaluation form filled out by the training station supervisor at the completion of each grading period.

#### V. TEXTBOOKS AND TEXTBOOK REFERENCES

Refer to the section under Clerical and Secretarial Office Procedures.

#### VI. BOOKLETS, PERIODICALS, JOURNALS, MAGAZINES AND MONOGRAPHS

References directly related to cooperative office education

*Advisor's Handbook*

*O.E.A. Contest Information*

*O.E.A. Advisor's Bulletin*

**Periodicals, journals and magazines**

*American Business Education*

*American Vocational Journal*

*Balance Sheet*

*Business Education Forum*

*Business Education World*

*U.S. News and World Report*

*Journal of Business Education*

*National Business Education Quarterly*

*Occupational Outlook Handbook*

*Office*

**Monographs**

91 *Handbook for Office Practice Teachers*. Marian Josephine Collins. South-Western Publishing Co., Cincinnati, 1964.

106 *Major Issues in Business Education*. Jerre E. Gratz. South-Western Publishing Co., Cincinnati, 1962.

112 *Planning the Facilities for Business Education*. William Selden, South-Western Publishing Co., Cincinnati, 1964.

115 *Requirements for Office and Distributive Education Teacher-Coordinators*. E. Edward Harris. South-Western Publishing Co., 1967

C456 *Suggestions for Programs of Office Practice and Procedures*. 1968.

Also see guidelines for Clerical and Secretarial Office Procedures.

**VII. FILMS, FILMSTRIPS, TAPES, RECORDS, TRANSPARENCIES, OPAQUE PROJECTIONS, CHARTS AND MODELS**

Refer to this section under Clerical and Secretarial Office Procedures and under Business Communications.

**VIII. EQUIPMENT AND SUPPLIES**

Refer to this section under Clerical and Secretarial Office Procedures.

**IX. LAYOUT AND FACILITIES**

Ideally this class should be arranged in an office-like manner. If this is not possible, this class should meet in the office procedures room.

## X. ORGANIZING A NEW COOPERATIVE EDUCATION PROGRAM

When implementing a cooperative education program, a coordinator will find it helpful to undertake the following steps: (They are not in order of importance.)

1. obtain a copy of the Montana Cooperative Education Coordinators Handbook
2. write a basic outline of the plan of your program; receive approval from the necessary administrators
3. choose and meet with an advisory committee
4. set up related courses and class schedule
5. set up policies (approved by administration)
  - a. student selection
  - b. coordination--duties and time allowed
  - c. student credit
  - d. work hours
  - e. wage rates
  - f. contracts for reimbursement (Office of the Superintendent of Public Instruction)
  - g. coordinator contract (extended period of time)
6. examine employment opportunities
7. obtain materials of instruction
8. plan classroom
9. plan office space for coordinator
10. draw up related course instructional outline
11. organize local chapter of Office Education Association
12. select training stations
13. plan ways of informing school and community members
14. develop training plans which are centered around career objectives

## XI. ADVISORY COMMITTEE

### A. Provisions for Advisory Committee

An advisory committee shall be established in an initial effort to obtain advice to improve the Vocational Business and Office Education programs.

### B. Committee Organization

1. Approximately 12 people shall be selected and invited to act as advisory committee members. In addition to several employees and employers in related fields, school personnel may be ex-officio members.
2. Advisory Committee members will be selected by the teacher-coordinator and approved by the principal and/or superintendent. A written invitation will come from the superintendent, not from the teacher-coordinator.

3. Term of membership--membership rotation should be set up on a one, two or three-year term.

#### C. Getting the Committee Started

1. Acquaint the committee with the vocational program.
2. Let the committee elect its own officers, call its own meetings and appoint subcommittees. (These will meet separately from regular committee.)
3. Have guidelines to show the functions of the committee, length of time to be served, etc.
4. Possibly, have one teacher meet with the committee and take the minutes.

#### D. Functions of Committee Meetings

1. Assist in improving curriculum patterns.
2. Advise in selection of purchasing and maintaining equipment and lending equipment.
3. Help from speakers bureau.
4. Free films and filmstrips for classes.
5. Aid in the placement of graduating business students.
6. Aid in securing job stations for cooperative office education students.
7. Teachers cooperate by listening to recommendations of the committee and keeping minutes of meetings and distributing them to all members of the advisory committee.
8. Help promote the Office Education program.
9. Assist in evaluation of the program.

It must be remembered, however, that the Advisory Committee is purely advisory in nature and does not assume any responsibilities of the school administration.

NOTE: Let the committee do the work. Don't let the teachers "hog the show."

Special and technical committees may be helpful. When you call a committee meeting, you must have an agenda which has been mailed out in advance to every member.

Three or four meetings a year should be adequate.

First meeting: information and organizational meeting.

Second meeting: exchanging ideas on training stations, develop training stations, talk about needs and help explain what a good training station is; suggest equipment, speakers and field trips.

Third meeting: overview of what has happened and an evaluation on the program; aid in placement of graduating business students.

Fourth meeting: explain needs for the coming year--aid in securing job stations for cooperative office education students.

For additional information on advisory councils send for the booklet: *Departmental Advisory Councils in the Public Schools*. Alfred H. Krebs. The Interstate Printers and Publishers, Inc., Danville, Illinois.

\*\*\*\*\*

**The following forms may be helpful in coordinating the  
Office Education Program**

\*\*\*\*\*

## COMMUNITY OFFICE EQUIPMENT SURVEY

The Business Education Department of           (name of school)           is distributing this questionnaire to a large percentage of the surrounding business establishments in an attempt to find out if we are utilizing the proper equipment in our classroom instruction. Since one of our functions as the business department is to serve the surrounding community in the training of potential employees, we would appreciate it very much if you would complete this form and return it to us as soon as possible.

EQUIPMENT	YES	NO	MAKE	MODEL
<b>Typewriters</b>				
Electric	_____	_____	_____	_____
Manual	_____	_____	_____	_____
Electronic	_____	_____	_____	_____
<b>Calculators and Adding Machines</b>				
Key-driven calculators	_____	_____	_____	_____
Ten-key adding machines	_____	_____	_____	_____
Full-key adding machines	_____	_____	_____	_____
Rotary calculators	_____	_____	_____	_____
Electronic calculators	_____	_____	_____	_____
<b>Duplicators</b>				
Mimeograph	_____	_____	_____	_____
Fluid	_____	_____	_____	_____
Offset	_____	_____	_____	_____
<b>Copying Machines</b>				
Xerox	_____	_____	_____	_____
Thermofax	_____	_____	_____	_____
Other	_____	_____	_____	_____
<b>Data Processing</b>				
Key punch	_____	_____	_____	_____
Verifier	_____	_____	_____	_____
Sorter	_____	_____	_____	_____
Collator	_____	_____	_____	_____
Tabulator printer	_____	_____	_____	_____
<b>Dictation and Transcription Machines</b>				
Tape	_____	_____	_____	_____
Belt	_____	_____	_____	_____
Disc	_____	_____	_____	_____
Stenotype	_____	_____	_____	_____
<b>Filing Equipment</b>				
Card files	_____	_____	_____	_____
Vertical files	_____	_____	_____	_____
Shelf-type files	_____	_____	_____	_____
<b>Communications Equipment</b>				
Switchboard	_____	_____	_____	_____
Intercom	_____	_____	_____	_____
Teletype	_____	_____	_____	_____
Card Dialer telephone	_____	_____	_____	_____
<b>Miscellaneous Equipment</b>				
Addressograph	_____	_____	_____	_____
Postage meter	_____	_____	_____	_____
Check proctector	_____	_____	_____	_____
Bookkeeping machine	_____	_____	_____	_____

FORM 2

COMMUNITY SURVEY

Name of Business \_\_\_\_\_ Type of Business \_\_\_\_\_

Address of Business \_\_\_\_\_

Name of Owner or Manager \_\_\_\_\_

Name of Person Interviewed \_\_\_\_\_ Position \_\_\_\_\_

Number of full-time office employees: Male \_\_\_\_\_ Female \_\_\_\_\_

Adult Male \_\_\_\_\_ Female \_\_\_\_\_

High School Male \_\_\_\_\_ Female \_\_\_\_\_

Number of full-time office employees hired within the past two years: Male \_\_\_\_\_ Female \_\_\_\_\_

Names of any Job Entrance Tests administered \_\_\_\_\_

Beginning salary of office employees hired \_\_\_\_\_  
(Average or Range)

Education desired of new full-time office employees \_\_\_\_\_

Special training desired of new full-time office employees \_\_\_\_\_

Additional comments concerning education and training desires of new full-time office employees:

Do you have a formal training program in your firm? Yes \_\_\_\_\_ No \_\_\_\_\_

Do you have difficulty securing office workers? Yes \_\_\_\_\_ No \_\_\_\_\_

If yes, for what particular occupations? \_\_\_\_\_

What do you feel are likely to be the best job opportunities in office occupations during the next few years?

Would you be interested in the Office Education Program? \_\_\_\_\_

Would you be interested in a cooperative office education student? \_\_\_\_\_



## RATING CHART FOR PROSPECTIVE OCCUPATIONAL LABORATORY

Occupation \_\_\_\_\_ Business Firm \_\_\_\_\_

Address \_\_\_\_\_ Date \_\_\_\_\_ 19 \_\_\_\_\_

Name of Owner or Manager \_\_\_\_\_

Trait to be Rated	Poor 1	Fair 2	Good 3	Excellent 4	Superior 5
1. Employer's interest in cooperative training.	_____	_____	_____	_____	_____
2. Available training facilities.	_____	_____	_____	_____	_____
3. Actual work in related occupational area.	_____	_____	_____	_____	_____
4. Provisions made for supervision.	_____	_____	_____	_____	_____
5. Opportunity for employment after training.	_____	_____	_____	_____	_____
6. Opportunity for advancement.	_____	_____	_____	_____	_____
7. Reputation of business.	_____	_____	_____	_____	_____
8. Pay scale.	_____	_____	_____	_____	_____
9. Fringe benefits received.	_____	_____	_____	_____	_____
10. Regularity of part-time employment.	_____	_____	_____	_____	_____
11. Distance of business from school.	_____	_____	_____	_____	_____
12. Lack of hazards.	_____	_____	_____	_____	_____

# COOPERATIVE TRAINING APPLICATION FOR ADMITTANCE

Please fill out in ink or type

Date \_\_\_\_\_

School \_\_\_\_\_

1. Applicant \_\_\_\_\_ Sex \_\_\_\_\_ Class \_\_\_\_\_

2. Home address \_\_\_\_\_ Telephone \_\_\_\_\_

3. Date of birth \_\_\_\_\_ Age \_\_\_\_\_ Height \_\_\_\_\_ Weight \_\_\_\_\_

4. Name of parent or guardian \_\_\_\_\_

5. Father's name \_\_\_\_\_ Occupation \_\_\_\_\_

6. Father's address if different from No. 2 \_\_\_\_\_

7. Mother's name \_\_\_\_\_ Occupation \_\_\_\_\_

8. Mother's address if different from No. 2 \_\_\_\_\_

9. What occupation are you interested in learning?

First choice \_\_\_\_\_

Second choice \_\_\_\_\_

10. Is there any particular place of business where you prefer to work? If so, give name of place and employer below.

Place of business \_\_\_\_\_

Manager \_\_\_\_\_

11. Are you working here now? Yes \_\_\_\_\_ No \_\_\_\_\_

12. Will you be working here during this coming summer? Yes \_\_\_\_\_ No \_\_\_\_\_

13. Where have you worked before

Place

Location

Manager

A. \_\_\_\_\_

B. \_\_\_\_\_

14. What subjects will you be taking next year? Include required subjects.

\_\_\_\_\_

\_\_\_\_\_

15. Subjects completed, grades and instructors in the subjects:

Sophomore Subject	Instructor	Grade	Junior Subject	Instructor	Grade
_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____

Application for Admittance (cont'd.)

16. Do you plan to go to college? \_\_\_\_\_
17. What are your plans after graduating? \_\_\_\_\_
18. Give three personal references. Please do not include family and teachers.
- A. Name \_\_\_\_\_ Address \_\_\_\_\_  
Phone \_\_\_\_\_ Business or Occupation \_\_\_\_\_
- B. Name \_\_\_\_\_ Address \_\_\_\_\_  
Phone \_\_\_\_\_ Business or Occupation \_\_\_\_\_
- C. Name \_\_\_\_\_ Address \_\_\_\_\_  
Phone \_\_\_\_\_ Business or Occupation \_\_\_\_\_
19. Do you have a car or other means of transportation? Yes \_\_\_ No \_\_\_
20. Do you have a valid Montana driver's license? Yes \_\_\_ No \_\_\_
21. Have you discussed the advisability of your enrolling in this course with your parents or guardian? Yes \_\_\_ No \_\_\_

Approved \_\_\_\_\_ Signed \_\_\_\_\_  
(Parent or Guardian) (Student Applicant)

Acceptable \_\_\_\_\_ Consideration \_\_\_\_\_ Not Acceptable \_\_\_\_\_

# COOPERATIVE EDUCATION PROGRAM

Checklist of Desirable Attributes  
for  
Cooperative Education Students

Instructor's Name \_\_\_\_\_

Your cooperation in checking the following list will be greatly appreciated. The following applicant for training in cooperative education will have to be employed at least \_\_\_\_\_ hours per week where he will be meeting the public and handling money or materials. Before the school can put its approval on this student, you will be able to give an honest evaluation. This information will be kept in strict confidence.

\_\_\_\_\_  
Coordinating Teacher

Student's Name \_\_\_\_\_ Date \_\_\_\_\_

	Excellent	Good	Fair	Poor
Honesty	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Alertness	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Personality	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Punctuality	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Regularity	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Cooperation	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Application	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Enthusiasm	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Ability to Learn	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Leadership	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Do you think this student would be a good representative of the school? \_\_\_\_\_

Would you hire this student? \_\_\_\_\_

**Note:** Homeroom Teachers

Number of days absent \_\_\_\_\_

This semester \_\_\_\_\_

Last semester \_\_\_\_\_

### INTRODUCTION CARD

Cooperative Office Education, \_\_\_\_\_ (name of) \_\_\_\_\_ High School

\_\_\_\_\_ Date

To the prospective employer \_\_\_\_\_

Firm name \_\_\_\_\_

This will introduce \_\_\_\_\_ of the Cooperative Office Education Program at  
(name of) High School, who is interested in obtaining part-time employment for at least 15  
hours per week to supplement the training in Business and Office Education received at  
school.

\_\_\_\_\_  
Teacher-Coordinator

(This is a reference sheet for the student to use when completing an application form).

### INFORMATION PLEASE

NAME \_\_\_\_\_ TELEPHONE NUMBER \_\_\_\_\_

ADDRESS \_\_\_\_\_ SOCIAL SECURITY NUMBER \_\_\_\_\_

	CITY	STATE	Educational Background		Course of Study
			Date Entered	Date Left	
Grammar	_____	_____	_____	_____	_____
Junior High	_____	_____	_____	_____	_____
High School	_____	_____	_____	_____	_____
College	_____	_____	_____	_____	_____
Overall High School Average	_____				

Listing of business and/or technical skills (typing, stenograph, use of business machines.)

SKILL AND YEARS OF EXPERIENCE	RATE
_____	_____
_____	_____
_____	_____
_____	_____

#### Previous Employment

Name of Employer	Dates of Employment		Name of Immediate Supervisor
	From	To	
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

#### Extracurricular Activities in School

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

#### Honors and Awards Received

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Hobbies and Interests: \_\_\_\_\_

REFERENCES: List below 3 individuals (not relatives) who know your character and abilities.

Complete name	Address	Phone No.
_____	_____	_____
_____	_____	_____
_____	_____	_____

# COOPERATIVE OFFICE EDUCATION PROGRAM TRAINING AGREEMENT

Student's Name \_\_\_\_\_ Birth Date \_\_\_\_\_ Age \_\_\_\_\_

Student's Address \_\_\_\_\_ Telephone \_\_\_\_\_

Name of School \_\_\_\_\_ Telephone \_\_\_\_\_

Name of Training Station \_\_\_\_\_ Telephone \_\_\_\_\_

Address of Training Station \_\_\_\_\_

Name of Training Sponsor \_\_\_\_\_ Position \_\_\_\_\_

Dates of Training Period. From \_\_\_\_\_ to \_\_\_\_\_

Average No. of hours per week to be worked by student \_\_\_\_\_

Student's rate of pay \_\_\_\_\_

## Responsibilities of the student

1. The student will keep regular attendance, both in school and on the job, and cannot work on any school day that he fails to attend school; he will notify the school and employer if he is unable to report.
2. The student's employment will be terminated if he does not remain in school.
3. The student will show honesty, punctuality, courtesy, a cooperative attitude, proper health and grooming habits, good dress and a willingness to learn.
4. The student will consult the teacher-coordinator about any difficulties arising at the training station.
5. The student will conform to the rules and regulations of the training station.
6. The student will furnish the teacher-coordinator with all necessary information and complete all necessary reports.

## Responsibilities of the parents:

1. The parents will encourage the student to effectively carry out his duties and responsibilities.
2. The parents will share the responsibility for the conduct of the student while training in the program.
3. The parents will be responsible for the safety and conduct of the student while he is traveling to and from the school, the training station and home.

## Responsibilities of the training sponsor:

1. The training sponsor will endeavor to employ the student for at least the minimum number of hours each day and each week for the entire agreed training period.
2. The training sponsor will adhere to all federal and state regulations regarding employment, child labor laws, minimum wages and other applicable regulations.

3. The training sponsor will see that the student is not allowed to remain in any one operation, job or phase of the occupation beyond the period of time where such experience is of educational value.
4. The training sponsor will consult the teacher-coordinator about any difficulties arising at the training station.
5. The training sponsor will provide experience for the student that will contribute to the attainment of the career objective.
6. The training sponsor will assist in the evaluation of the student.
7. The training sponsor will provide time for consultation with the the teacher-coordinator concerning the student.
8. The training sponsor will provide instructional material and occupational guidance for the student as needed and available.

**Responsibilities of the school**

1. The school administration will employ and retain a qualified teacher-coordinator.
2. The school administration will allow the teacher-coordinator sufficient time to provide the related instruction and to carry on necessary coordinating activities.

**Responsibilities of the teacher-coordinator**

1. The teacher-coordinator will coordinate related classroom instruction and on-the-job training to improve job performance and to better prepare the student for his occupational career objective.
2. The teacher-coordinator will see that the necessary related classroom instruction is provided.
3. The teacher-coordinator will make periodic visits as necessary to the training station to observe the student and consult with the employer and training sponsor.
4. The teacher-coordinator will assist in the evaluation of the student.

This agreement may be terminated by mutual consent of the training sponsor and the teacher-coordinator.

	_____
	Date
Student	Training Sponsor
Parent	Teacher Coordinator



# WEEKLY STUDENT REPORT

Name \_\_\_\_\_ Phone \_\_\_\_\_

Business Firm \_\_\_\_\_ Supervisor \_\_\_\_\_

Date Started \_\_\_\_\_ Assignment \_\_\_\_\_

Date Terminated \_\_\_\_\_ Reason \_\_\_\_\_

Week From	Week To	Hours Worked	Hourly Wage	Total Earned	Job Training, experience and duties performed. List any problems.
-----------	---------	--------------	-------------	--------------	---

Days absent \_\_\_\_\_  
Why \_\_\_\_\_

Days absent \_\_\_\_\_  
Why \_\_\_\_\_

Days absent \_\_\_\_\_  
Why \_\_\_\_\_

Days absent \_\_\_\_\_  
Why \_\_\_\_\_

Days absent \_\_\_\_\_  
Why \_\_\_\_\_

Days absent \_\_\_\_\_  
Why \_\_\_\_\_

Days absent \_\_\_\_\_  
Why \_\_\_\_\_

(The form, with headings, could be continued on the reverse side.)

# COOPERATIVE EDUCATION STUDENT EVALUATION

STUDENT \_\_\_\_\_

EVALUATED BY \_\_\_\_\_

Date \_\_\_\_\_

<b>ATTITUDE</b> (Mental approach of mood)	Not Cooperative. Negative response to supervision.	Reasonably interested in job. Makes an occasional suggestion. Performs as directed.	Intense interest in job. Possesses leadership qualities; generates enthusiasm in others.	Receptive to new ideas. Alert to opportunity to improve work.	Indifferent approach to job. Does only what is required.
<b>KNOWLEDGE OF OF JOB</b>	Limited knowledge. Considerable supervision required.	Handles assignments with partial assistance. Frequent instruction required.	Capably handles all usual job situations. Knowledge and productivity increasing.	Capable of instructing others. Broad background of job experience.	Completes daily work satisfactorily, Occasional direction required.
<b>JUDGEMENT</b>	Unpredictable. Cannot make decisions or makes decisions based on emotions.	Good judgment. Decisions can be relied on.	Usually makes sound decisions. Could improve with experience.	Decisions not always sound. Immature.	Sound judgment. Clear thinker under pressure. Decisions respected and frequently sought by fellow employees.
<b>INITIATIVE</b>	Completes own work. Readily offers assistance to others.	Requires prodding to complete jobs. Lazy.	Completes own work but seldom volunteers for other duties.	Completes own work and generally volunteers to help others.	Self starter. Completes own work and actively looks for jobs in area of business. Makes worthwhile suggestions.
<b>QUANTITY OF WORK</b>	Well below minimum standards.	Production satisfactory. Meets minimum standards, established for an experienced employee.	Exceptional production.	Consistently well above minimum standards established for an experienced employee.	Does not yet meet our minimum standards.
<b>QUALITY OF WORK</b>	Completes work in commendable manner. Catches own errors.	Not consistently good. Requires frequent checking for errors.	Does a complete and thorough job. Exceptionally accurate.	Generally acceptable. Room for improvement.	Not acceptable. Too many errors. Many jobs have to be re-done.
<b>CAPACITY TO LEARN</b>	Must repeat instructions in general. Work must be checked occasionally. Learns less readily than most.	Outstanding ability to comprehend instructions and new ideas, and to retain what has been learned.	Learns fairly fast. Retains most of what has been learned.	Must repeat instructions in detail and check work frequently. Learns slowly.	Quick to learn. Asks intelligent questions. Retains knowledge.
<b>HUMAN RELATIONS</b>	Adequate relations with customers and associates. Cooperative.	Courteous. Friendly. Has poise and dignity. Well accepted by customers and associates.	Abrupt. Lacks poise. Not responsive to public and/or associates.	Antagonistic. Self-centered. Lacks tact.	Dynamic personality. Influences others. Attracts and holds customers. Respected by associates.
<b>APPEARANCE</b> (Manner of dress)	Exceptional.	Above standard.	Acceptable.	Below standard.	Not acceptable.

COMMENTS:

# STUDENT EVALUATION SHEET

## Cooperative Education

How has the experience you received on your training program been valuable to you?

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Could the training on the job have been improved? \_\_\_\_\_ If so, how?

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Was the training you received in school related to the work you were doing on the job?

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Can you make any suggestions which you feel would improve the classroom instruction?

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What parts of the classroom instruction did you find most beneficial (discussions, reports, interviews, demonstrations, etc.)? \_\_\_\_\_

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Please make any suggestions you have for improving the program.

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# FOLLOW-UP SURVEY FOR COOPERATIVE OFFICE EDUCATION GRADUATES

Name \_\_\_\_\_ Year of Graduation \_\_\_\_\_  
 Age \_\_\_\_\_ Marital status \_\_\_\_\_  
 Address \_\_\_\_\_ Children \_\_\_\_\_  
 \_\_\_\_\_  
 Telephone \_\_\_\_\_

1. Training station during High School \_\_\_\_\_

Name of employer \_\_\_\_\_ Telephone \_\_\_\_\_

2. Presently employed (Company) \_\_\_\_\_

Name of employer \_\_\_\_\_ Address \_\_\_\_\_  
 Telephone \_\_\_\_\_

3. What vocational courses did you take in high school? \_\_\_\_\_  
 \_\_\_\_\_

4. Have you benefited from these courses? \_\_\_\_\_

5. What skills are you using in your present position? \_\_\_\_\_  
 \_\_\_\_\_

What other duties and responsibilities do you have? \_\_\_\_\_

6. Were there any areas in which you needed more training for your present position?

Typing _____	Business Law _____	Personal budgeting _____
Shorthand _____	Human relations _____	Telephone technique _____
Office Machines _____	Spelling _____	Business Math _____
Filing _____	Grammar _____	Economics _____
Bookkeeping _____	Grooming _____	Date Processing _____
		Others: _____

7. Are there opportunities for advancement in your present position? \_\_\_\_\_

8. Do you work a 40-hour week? \_\_\_\_\_ 9. What is your monthly salary? \_\_\_\_\_

9. Do you receive any fringe benefits? If so what are they? \_\_\_\_\_  
 \_\_\_\_\_

11. Did you further your education upon graduation? \_\_\_ If so, when \_\_\_\_\_  
 where \_\_\_\_\_ major field \_\_\_\_\_

12. Are you satisfied with your present position? \_\_\_\_\_

13. Would you be willing and available to come into the high school to talk to the present office education class and/or underclassmen? \_\_\_\_\_

A stamped, self-addressed envelope is enclosed.

Please return to:  
 (Name of teacher-coordinator)  
 Department  
 High School  
 City, State Zip

## **PUBLISHERS AND MANUFACTURERS**

The following pages contain current names and addresses of publishers and manufactueres referred to throughout the guideline.

## PUBLISHERS AND MANUFACTURERS

Advertising Council  
25 W. 45th Street  
New York, New York 10036

Allied Publishers  
655 Morgan Building  
Portland, Oregon 79205

Allyn and Bacon  
150 Tremont Street  
Boston, Massachusetts 02111

American Bankers Association  
12 E. 36th Street  
New York, New York 10016

American Book Company  
55 Fifth Avenue  
New York, New York 10003

American Economic Foundation  
51 E 42nd Street  
New York, New York 10017

American Gas Association  
605 Third Avenue  
New York, New York 10016

American Telephone and Telegraph Co.  
195 Broadway  
New York, New York 10007

Appleton-Century-Crofts  
440 Park Avenue South  
New York, New York 10016

Arco Publishing Company  
219 Park Avenue  
New York, New York 10003

Association Films  
347 Madison Avenue  
New York, New York 10017

Audio-Visual Aids Center  
University of Connecticut  
Storrs, Connecticut 06268

Barnes and Noble  
105 Fifth Avenue  
New York, New York 10003

Barron's Education Series  
113 Crossways Park Drive  
Woodbury, New York 11797

Charles Bessler Company  
60 Badger Avenue  
Newark, New Jersey 07108

Best Values Company  
403 Market Street  
Newark, New Jersey 07105

Better Business Bureau  
723 Chrysler Building  
New York, New York 10017

Bobbs-Merrill Company  
4300 West 62nd Street  
Indianapolis, Indiana 46206

R. R. Bowk  
1180 Avenue of the Americas  
New York, New York 10036

Stanley Bowmar Company  
12 Cleveland Street  
Valhalla, New York 10595

Brookings Institution  
1775 Massachusetts Avenue, N.W.  
Washington, D. C. 20036

Herbert E. Budek Company  
324 Union Street  
Hackensack, New Jersey 07601

Bureau of National Affairs  
1231 24th Street  
Washington, D. C. 20037

Burroughs Corporation  
76 Park Avenue  
Park Ridge, New Jersey 07656

Business Education Films  
4607 16th Avenue  
Brooklyn, New York 11204

Business Education Visual Adis  
104 West 61st Street  
Sacramento, California 95814

California State Dept. of Education  
721 Capital Mall  
Sacramento, California 95814

Cambridge University Press  
32 East 57th Street  
New York, New York 10022

Carousel Films  
1501 Broadway  
New York, New York 10036

Chandler Publishing Company  
124 Spear Street  
San Francisco, California 94105

Collier Books  
640 Fifth Avenue  
New York, New York 10011

Columbia University Press  
2960 Broadway  
New York, New York 10027

Committee for Economic Development  
100 Connecticut Avenue, N.W.  
Washington, D.C. 20036

Consumers' Research  
Washington, New Jersey 07882

Corbett Blackboard Stencils  
548 Third Avenue  
North Pelham, New York 17044

Coronet Films  
65 E.S. Water Street  
Chicago, Illinois 60601

Council for Advancement of Secondary  
Education  
1201 16th Street, N.W.  
Washington, D.C. 20036

George F. Cram Company  
Box 426  
730 East Washington Street  
Indianapolis, Indiana 46206

Credit Union National Association  
1617 Sherman Avenue  
Madison, Wisconsin 53704

Thomas Y. Crowell Company  
201 Park Avenue South  
New York, New York 10003

Denoyer-Geppert Company  
5235 Ravenswood Avenue  
Chicago, Illinois 60640

Denver Board of Education  
201 East Colfax Avenue  
Denver, Colorado 80203

A.B. Dick Company  
5700 West Touhy Avenue  
Chicago, Illinois 60648

Dictaphone Corporation  
730 Third Avenue  
New York, New York 10017

Dictation Disc Company  
170 Broadway  
New York, New York 10038

Ditto Inc. Corp  
6856 McCormick Road  
Chicago, Illinois 60645

Doubleday and Company  
277 Park Avenue  
Garden City, New York 10017

Dover Publications  
180 Varick Street  
New York, New York 10014

E. I. Dupont DeNemours and Co.  
Wilmington, Delaware 19801

Thomas A. Edison, Inc.  
51 Lakeside Avenue  
West Orange, New Jersey 07052

Educational Developmental Laboratories 284 East Pulaski Road Huntington, New York 11744	Harvard University Press 79 Garden Street Cambridge, Massachusetts 02138	Life Filmstrips 9 Rockefeller Plaza New York, New York 10020
Electronic Futures 301 State Street North Haven, Connecticut 06473	Health Insurance Institute 488 Madison Avenue New York, New York 10022	J.B. Lippincott Company E. Washington Sq. Philadelphia, Pennsylvania 19105
EMC Recordings Corp. 806 East Seventh Street St. Paul, Minnesota 55106	D.C. Heath and Company 285 Columbus Avenue Boston, Massachusetts 02116	Louisiana Polytechnic Institute Ruston, La. 71270
Encyclopedia Britannica Films 1150 Wilmette Avenue Wilmette, Illinois 60091	Holt, Rinehart and Winston 383 Madison Avenue New York, New York 10017	Lyons and Carnahan 407 E. 25th St. Chicago, Illinois 60616
Federal Reserve Bank of New York 33 Liberty Street New York, New York 10005	Houghton Mifflin Co. 2 Park St. Boston, Massachusetts 02107	MacMillan Co. 50 Fifth Avenue New York, New York 10011
Friden Calculating Machine Co. 2350 Washington Avenue San Leandro, California 95477	Household Finance Corp. Prudential Plaza Chicago, Illinois 60601	Marchant Calculating Machine Co. 410 Park Avenue New York, New York 10022
General Mills 9200 Wayzata Boulevard Minneapolis, Minnesota 55440	Ideal Picture Corp. 1600 Broadway New York, New York 10019	McBee Systems Athens, Ohio 45701
General Motors 1775 Broadway New York, New York 10019	Illinois Council on Economic Education Springfield, Illinois 62706	McClure Printing Co. Staunton, Va. 24401
Geographical Slide Service 200 East Irwin State College, Pennsylvania 16801	Institute of Life Insurance 488 Madison Avenue New York, New York 10022	McGraw-Hill Book Co. 330 W. 42nd St. New York, New York 10036
Geo-Physical Maps 101 Park Avenue New York, New York 10017	Insurance Information Institute 60 John St. New York, New York 10038	McKinley Publishing Co. 112 New Bkway. Brooklawn, New Jersey 08030
Ginn and Company 175 Fifth Avenue New York, New York 10010	International Business Machines 590 Madison Avenue New York, New York 10022	McKnight and McKnight Publishing Company U.S. Route 66 and Towanda Avenue Bloomington, Illinois 61702
Gordon and Breach 150 Fifth Avenue New York, New York 10011	Richard D. Irwin 1818 Ridge Road Homewood, Illinois 60430	Merrill, Lynch, Pierce, Fenner and Smith 70 Pine Street New York, New York 10005
Gray Audograph Corp. 18 East 41st Street New York, New York 10017	Jam Handy Organization 2821 E. Grand Blvd. Detroit, Michigan 48211	Herman Miller 2601 East Olympic Boulevard Los Angeles, California 90023
Grosset and Dunlap 51 Madison Avenue New York, New York 10010	Joint Council on Economic Education 2 W. 46th Street New York, New York 10036	Modern Talking Picture Service 3 East 54th Street New York, New York 10022
C.S. Hammond and Co. Maplewood, New Jersey 07040	Jones and Lamson Clinton Street Springfield, Vermont 05156	Monroe Calculating Machine Co. 555 Mitchell Street Orange, New Jersey 07052
Harcourt, Brace and World 757 Third Avenue New York, New York 10017	Keystone Steel and Wire Co. Peoria, Illinois 61607	National Association of Manufacturers 177 Park Avenue New York, New York 10017
Harper and Rowe 49 East 33rd Street New York, New York 10016	Kimberly-Clark Corp. Marketing Center Neenah, Wisconsin 54957	

National Association of  
School Principals  
1201 16th Street, N.W.  
Washington, D.C. 20036

National Blank Book Co.  
Water Street  
Holyoke, Massachusetts 01040

National Bureau of Economic Research  
261 Madison Avenue  
New York, New York 10016

National Business Education Assn.  
1201 16th Street, N.W.  
Washington, D. C. 20036

National Committee for Education in  
Family Finance  
488 Madison Avenue  
New York, New York 10022

National Council for the Social  
Studies  
1201 16th Street, N.W.  
Washington, D. C. 20036

National Education Association  
1202 16th Street, N.W.  
Washington, D.C. 20036

National Industrial Conference Board  
845 Third Avenue  
New York, New York 10022

National Office Management Assn.  
425 13th Street, N.W.  
Washington, D. C. 20004

National Sales Executive  
136 East 57th Street  
New York, New York 10022

National Secretary's Association  
1103 Grand Avenue  
Kansas City, Missouri 64116

National Schools Committee for  
Economic Education  
25 West 43rd Street  
New York, New York 10036

New American Library of  
World Literature  
1310 Avenue of the Americas  
New York, New York 10019

New York Life Insurance Company  
Box 51, Madison Square Station  
New York, New York 10038

New York State Council on  
Economic Education  
65 Liberty Street  
New York, New York 10005

New York Stock Exchange  
11 Wall Street  
New York, New York 10005

W. W. Norton and Company  
55 Fifth Avenue  
New York, New York 10003

A. J. Nystrom and Company  
3333 Elston Avenue  
Chicago, Illinois 60618

Olivetti Underwood Corporation  
1 Park Avenue  
New York, New York 10016

Oxford Book Company  
71 Fifth Avenue  
New York, New York 10016

Oxford University Press  
417 Fifth Avenue  
New York, New York 10016

Penguin Books  
3330 Clipper Mill Road  
Baltimore, Maryland 21211

Pix Film Service  
34 East Putnam Avenue  
Greenwich, Connecticut 06830

Prentice-Hall  
Englewood Cliffs, New Jersey

Public Affair Institute  
312 Pennsylvania Avenue, S.E.  
Washington, D.C. 20003

Purdue University  
308 State Street  
W. Lafayette, Indiana 47906

Pure Oil Company  
Film Library  
200 East Golf Road  
Palatine, Illinois 60067

G. P. Putnam's Sons  
200 Madison Avenue  
New York, New York 10016

Rand McNally and Company  
8255 Central Park Avenue  
Skokie, Illinois 60076

Regents Publishing Company  
200 Park Avenue South  
New York, New York 10003

Remington Rand Corporation  
315 Fourth Avenue  
New York, New York 10010

Ronald Press Company  
15 East 26th Street  
New York, New York 10010

Roundtable Films  
275 South Beverly Drive  
Beverly Hills, California 90210

H. M. Rowe Company  
624 North Gilmore Street  
Baltimore, Maryland 21217

Science Research Associates  
259 East Erie Street  
Chicago, Illinois 60611

Scott, Foresman and Company  
322 East Erie Street  
Chicago, Illinois 60611

Charles Scribner's Sons  
597 Fifth Avenue  
New York, New York 10017

Simon and Schuster  
630 Fifth Avenue  
Rockefeller Center  
New York, New York 10020

South-Western Publishing Company  
11 Guittard Road  
Burlingame, California 94010

Speed-O-Print  
833 Broadway  
New York, New York 10003

Stenocord Dictation System  
3755 Beverly Boulevard  
Los Angeles, California 90004

Steno-Disc  
1329 North Western Avenue  
Hollywood, California 90027

Sterling Movies U.S.A.  
43 West 61st Street  
New York, New York 10023

Trethaway  
15 South Franklin Street  
Wilkes-Barre, Pennsylvania 18701

Twentieth Century Fund  
41 East 70th Street  
New York, New York 10021

U.S. Civil Service Commission  
Washington, D. C. 20415

U.S. Department of Health,  
Education and Welfare  
330 Independence Avenue, S.W.  
Washington, D. C. 20202



U.S. Geological Survey  
Washington, D.C. 20242

U.S. Government Printing Office  
North Capital Street, N.W.  
Washington, D.C. 20402

U.S. Office of Education  
330 Independence Avenue S.W.  
Washington, D.C. 20202

U.S. Treasury  
U.S. Savings and Loan League  
Washington, D. C. 20226

U.S. Treasury Department  
55 Tremont Street  
Boston, Massachusetts 02108

University of Chicago Press  
5750 Ellis Avenue  
Chicago, Illinois 60637

University of Michigan Press  
615 East University  
Ann Arbor, Michigan 48106

University of the State of New York  
State Education Department  
135 Western Avenue  
Albany, New York 12203

University of Toronto Press  
Front Campus  
Toronto 5, Canada

D. Van Nostrand Company  
120 Alexander Street  
Princeton, New Jersey 08540

Wadsworth Publishing Company  
10 Davis Drive  
Belmont, California 94002

Wall Street Journal  
44 Broad Street  
New York, New York 10004

John Wiley and Sons  
605 Third Avenue  
New York, New York 10016

John C. Winston Company  
1010 Arch Street  
Philadelphia, Pennsylvania 19107

John Wood Company  
Broadway and Wood Streets  
Muskegon, Michigan 49444

George Witterborn  
1018 Madison Avenue  
New York, New York 10021

World Book Company  
2601 16th Street, N.W.  
Washington, D. C. 20009



## CONTRIBUTORS

- I. Daniel G. Hertz      Institute Director, School of Commerce  
Montana State University, Bozeman, Montana
  
- II. Miss Janet Hughes      Supervisor of Business Education  
Office of Superintendent  
of Public Instruction  
Helena, Montana
  
- III. Consultants and Group Leaders from the School of Commerce, Montana State University,  
Bozeman, Montana  

Charlet Beland	Daniel G. Hertz
Lee Critchfield	Dr. Harvey Larson
Floyd Frost	Charles Lein
Adrian Griggs	Dr. J. B. Walden
  
- IV. Curriculum  
All participants contributed to the development of curriculum patterns for the various sequences.
  
- V. Basic Business  
Robert Burger, Missoula Vocational-Technical Center, Missoula, Montana  
Mary Ellen Burns, Choteau High School, Choteau, Montana  
Ivell Halseide, Culbertson High School, Culbertson, Montana  
Janet Higgins, Malta High School, Malta, Montana  
Edith Kates, Hardin Senior High School, Hardin, Montana  
Bill Mudro, Jefferson County High School, Boulder, Montana  
Karen Munson, Helena Senior High School, Helena, Montana  
Ronald Newville, Hardin Senior High School, Hardin, Montana  
Jane Slattery, Helena High School, Helena, Montana
  
- VI. Economics  
Robert Burger, Missoula Vocational-Technical Center, Missoula, Montana  
Mary Ellen Burns, Choteau High School, Choteau, Montana  
Art Coughenour, Bigfork High School, Bigfork, Montana  
Sister Mary Julianne O'Flannigan, Butte Central High School, Butte, Montana
  
- VII. Consumer Economics  
Robert Burger, Missoula Vocational-Technical Center, Missoula, Montana  
Mary Ellen Burns, Choteau High School, Choteau, Montana  
Art Coughenour, Bigfork High School, Bigfork, Montana  
Jean Majoros, Billings West High School, Billings, Montana  
Lillian McCammon, Helena Vo-Tech School, Helena, Montana  
Sister Mary Julianne O. Flannigan, Butte Central High School, Butte, Montana  
Virginia Ross, Columbia Falls High School, Columbia Falls, Montana  
Gene Saylor, Sidney Senior High School, Sidney, Montana
  
- VIII. Bookkeeping  
Barbee Buchanan, Moore High School, Moore, Montana  
Mary Ellen Burns, Choteau High School, Choteau, Montana  
Art Coughenour, Bigfork High School, Bigfork, Montana

Janet Higgins, Malta High School, Malta, Montana  
Everett Hunt, Stanford High School, Stanford, Montana  
Bill Mudro, Jefferson County High School, Boulder, Montana  
Kay Nelson, Belfry High School, Belfry, Montana  
Jane Slattery, Helena High School, Helena, Montana

IX. Data Processing

Art Coughenour, Bigfork High School, Bigfork, Montana  
Karen Munson, Helena Senior High School, Helena, Montana  
Sister Mary Julianne O'Flannigan, Butte Central High School, Butte, Montana  
Virginia Ross, Columbia Falls High School, Columbia Falls, Montana

X. Business Law

Barbee Buchanan, Moore High School, Moore, Montana  
Mary Ellen Burns, Choteau High School, Choteau, Montana  
Everett Hunt, Stanford High School, Stanford, Montana  
Bill Mudro, Jefferson County High School, Boulder, Montana  
Kay Nelson, Belfry High School, Belfry, Montana  
Virginia Ross, Columbia Falls High School, Columbia Falls, Montana  
Jane Slattery, Helena High School, Helena, Montana  
Katharine Turnquist, Wibaux County High School, Wibaux, Montana

XI. Business Machines

Barbee Buchanan, Moore High School, Moore, Montana  
Linda Davies, Great Falls High School, Great Falls, Montana  
Ivell Halseide, Culbertson High School, Culbertson, Montana  
Janet Higgins, Malta High School, Malta, Montana  
Kay Nelson, Belfry High School, Belfry, Montana  
Leon Sevier, Dawson County High School, Glendive, Montana  
Katharine Turnquist, Wibaux County High School, Wibaux, Montana

XII. Business Mathematics

Robert Burger, Missoula Vocational-Technical Center, Missoula, Montana  
Art Coughenour, Bigfork High School, Bigfork, Montana  
Ivell Halseide, Culbertson High School, Culbertson, Montana  
Everett Hunt, Stanford High School, Stanford, Montana  
Leon Sevier, Dawson County High School, Glendive, Montana

XIII. Business Communications

Eunice Anderson, C.M. Russell High School, Great Falls, Montana  
Barbee Buchanan, Moore High School, Moore, Montana  
Shirley Christiansen, C.M. Russell High School, Great Falls, Montana  
Art Coughenour, Bigfork High School, Bigfork, Montana  
Linda Davies, Great Falls High School, Great Falls, Montana  
Virginia Ross, Columbia Falls High School, Columbia Falls, Montana  
Leon Sevier, Dawson County High School, Glendive, Montana

XIV. Typing I and Typing--Third Semester

Eunice Anderson, C.M. Russell High School, Great Falls, Montana  
Art Coughenour, Bigfork High School, Bigfork, Montana  
Janet Higgins, Malta High School, Malta, Montana  
Jean Majoros, Billings West High School, Billings, Montana  
Bill Mudro, Jefferson County High School, Boulder, Montana  
Karen Munson, Helena Senior High School, Helena, Montana  
Jane Slattery, Helena High School, Helena, Montana  
Katharine Turnquist, Wibaux County High School, Wibaux, Montana

- XV. Shorthand I, Shorthand II and Transcription  
Eunice Anderson, C.M. Russell High School, Great Falls, Montana  
Janet Higgins, Malta High School, Malta, Montana  
Edith Kates, Hardin Senior High School, Hardin, Montana  
Jean Majoros, Billings West High School, Billings, Montana  
Kay Nelson, Belfry High School, Belfry, Montana  
Sister Mary Julianne O'Flannigan, Butte Central High School, Butte, Montana  
Leon Sevier, Dawson County High School, Glendive, Montana  
Katherine Turnquist, Wibaux County High School, Wibaux, Montana





